

Transport for London

Attitudes towards cycling  
September 2016 report  
TfL number: 05110  
FT number: 1986  
FINAL REPORT

future  
thinking

MAYOR OF LONDON

Transport for London



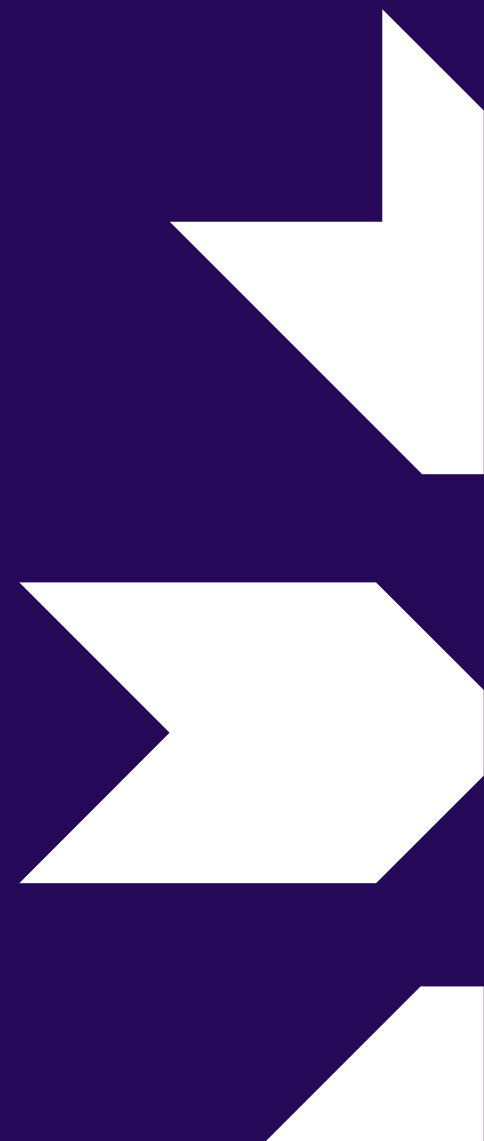
# Contents

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Introduction and reporting note	<b>4</b>	Other initiatives	<b>112</b>
Summary of key findings	<b>7</b>	Cycling events	<b>130</b>
Profile of cyclists and cycling behaviour	<b>26</b>	Cycle training	<b>133</b>
Children's cycling	<b>60</b>	Investment in cycling	<b>141</b>
Behaviour change	<b>63</b>	Cycle crime	<b>147</b>
Motivations and deterrents	<b>68</b>	Cycling confidence	<b>152</b>
Attitudes to cycling	<b>75</b>	TfL Journey Planner	<b>157</b>
Cycle Hire	<b>83</b>	Cycling section of TfL website	<b>159</b>
Cycle Superhighways	<b>100</b>	Methodology and sample profile	<b>168</b>



# Introduction and reporting note



# Introduction

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To support the **Mayor's Vision for Cycling**, which sets out to double cycling over a decade (from 2013 to 2023), Transport for London (TfL) is making significant investment including new and improved cycle routes through central London, and innovative 'Mini-Hollands' in outer London boroughs

"Attitudes towards Cycling" has been conducted since 2005 to assess cycling activity and attitudes among Londoners, and is one of a suite of important information sources to inform the delivery of this vision

The results shown here are from the September 2016 survey which comprised 2,315 online interviews with adult Londoners. Data is weighted to represent the London population in terms of age, gender, ethnicity, working status and location (inner/outer London)







# Reporting note

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This report is split into two main parts:

- An executive summary section looking at key metrics and drawing out emerging stories and themes
- A library appendix containing the results for every question in the survey broken down by key demographics where relevant

Throughout this report, data from September 2016 is compared with the last online wave's figures (March 2016). Statistically significant differences are shown as follows:

 Significantly lower than March 2016	 Significantly higher than March 2016
 Significantly lower than subgroup(s)	 Significantly higher than subgroup(s)

Prior to September 2013, fieldwork was conducted via telephone. Where question wording is consistent we show comparisons with these earlier waves of research for certain key measurements

From April 2014 TfL has adopted the 2011 Census data to define a 'representative' sample of Londoners, and data for 2014, 2015 and 2016 in this report is weighted to represent this population. Data from previous waves continues to be weighted to the 2001 Census. Analysis has shown that this update in weighting has not materially affected key performance indicators

Please note that the definition of a 'cyclist' was changed in the March 2016 wave from those 'who sometimes use a bike to get around London' to those 'who have cycled in London in the last 12 months' to align with other TfL research such as the London Travel Demand Survey

The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized letter 'A' or a similar abstract form, composed of several triangular and quadrilateral sections. The text 'Summary of key findings' is centered horizontally and positioned in the middle of the green area.

# Summary of key findings

## Key findings

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**01**

Overall, the number of Londoners cycling has remained largely static recently, although most Londoners can ride a bike indicating that there remains clear potential to increase cycling levels

**02**

Londoners' perceptions of cycling continue to be mainly positive and encouragingly there are signs that cyclists are being increasingly seen as respectful and law abiding

**03**

Improved infrastructure seems to be playing a key role in encouraging Londoners to cycle more and perceptions of TfL in relation to cycling have reached new peaks this wave

**04**

TfL's online cycling tools are rated highly by those who have used them and encouraging further use could potentially help to raise cycling levels in the Capital

**05**

Cycle Hire, Cycle Superhighways and Quietways all appear to have the potential to increase cycling levels, with the majority of current users feeling encouraged to cycle more





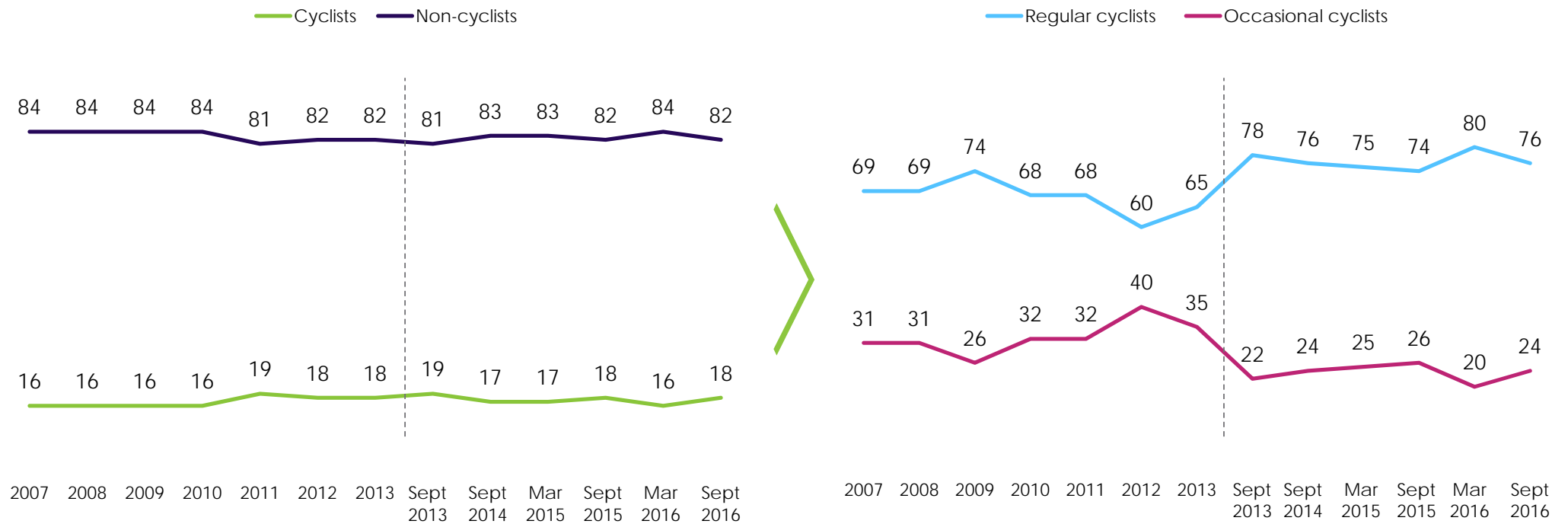


**LONDONERS CYCLING  
HAS REMAINED STATIC  
OVER RECENT YEARS**





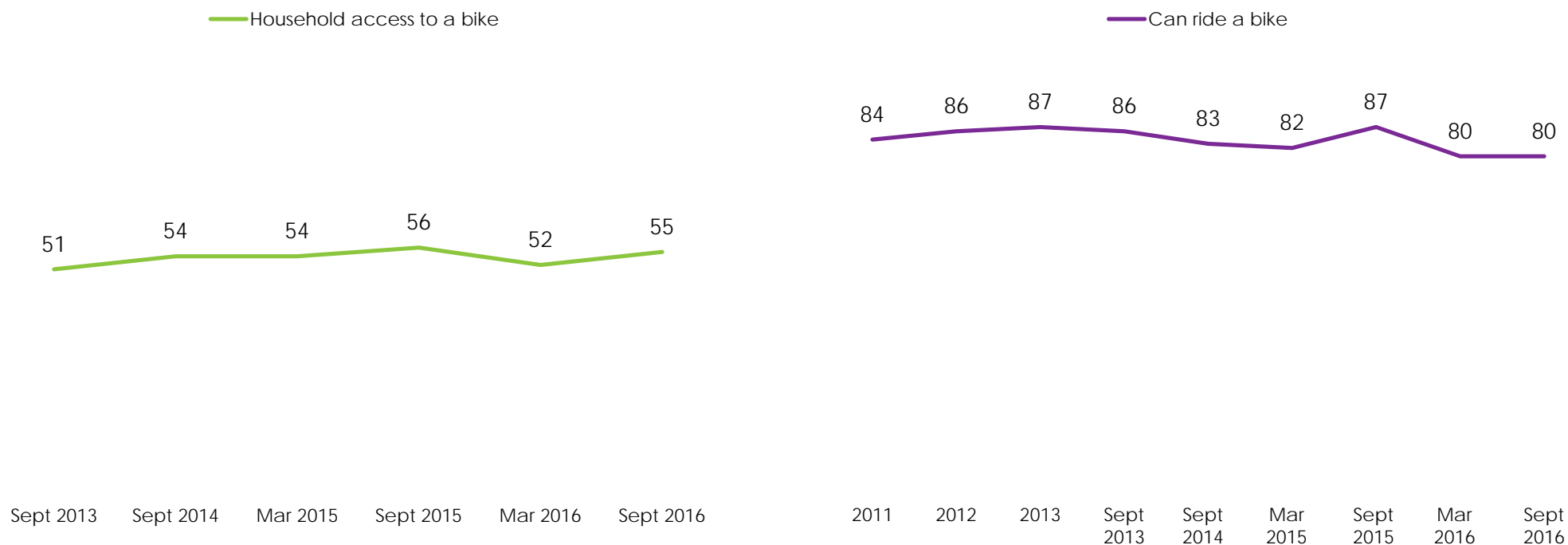
# Cycling levels in London have not fluctuated much over time, although over the last three years we have seen people cycling more frequently



Prior to Sept 2013, the survey was conducted via telephone. An online methodology has been used since Sept 2013



# Over half have access to a bike and the majority can ride one, indicating that there is considerable scope to get more Londoners cycling







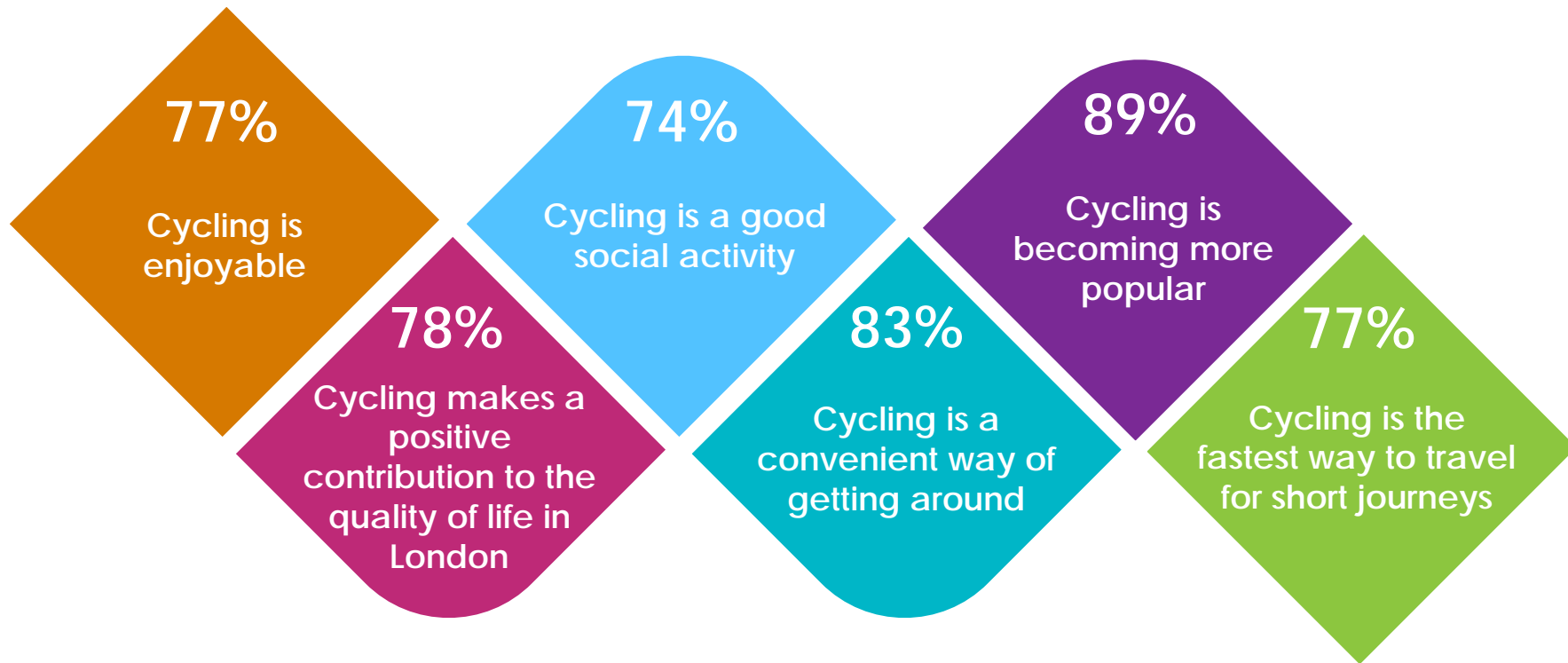
**PERCEPTIONS OF  
CYCLING REMAIN  
POSITIVE AMONG  
LONDONERS**





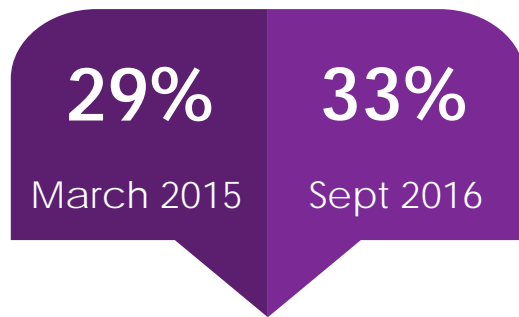
## Londoners continue to hold many positive associations with cycling

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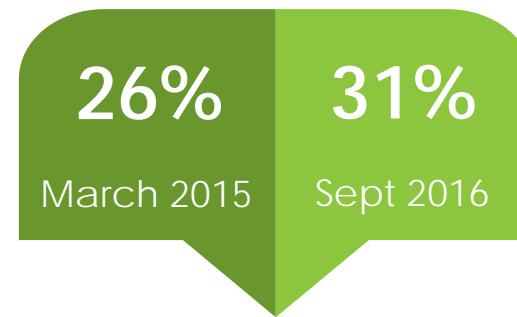


## Perceptions of **cyclists** also appear to be improving

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Cyclists in general are...  
**Respectful**



Cyclists in general are...  
**Law abiding**

**INFRASTRUCTURE  
IMPROVEMENTS IN  
THE CAPITAL LARGELY  
WELCOMED BY  
LONDONERS**





# Infrastructure improvements appear to be a key factor behind Londoners cycling more and fewer non-cyclists now say poor infrastructure is deterring them from getting on their bike

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Information and signs **make it easy** to find your way around when cycling

64%

58% in Mar 2016

(Record level reached this wave)

Among those **cycling more** this year, this is mainly due to **their route being improved** in some way

60%

**Poor infrastructure** seems to be **less of a deterrent** to non-cyclists **taking up cycling** compared to two years ago

23%

Sept 2014

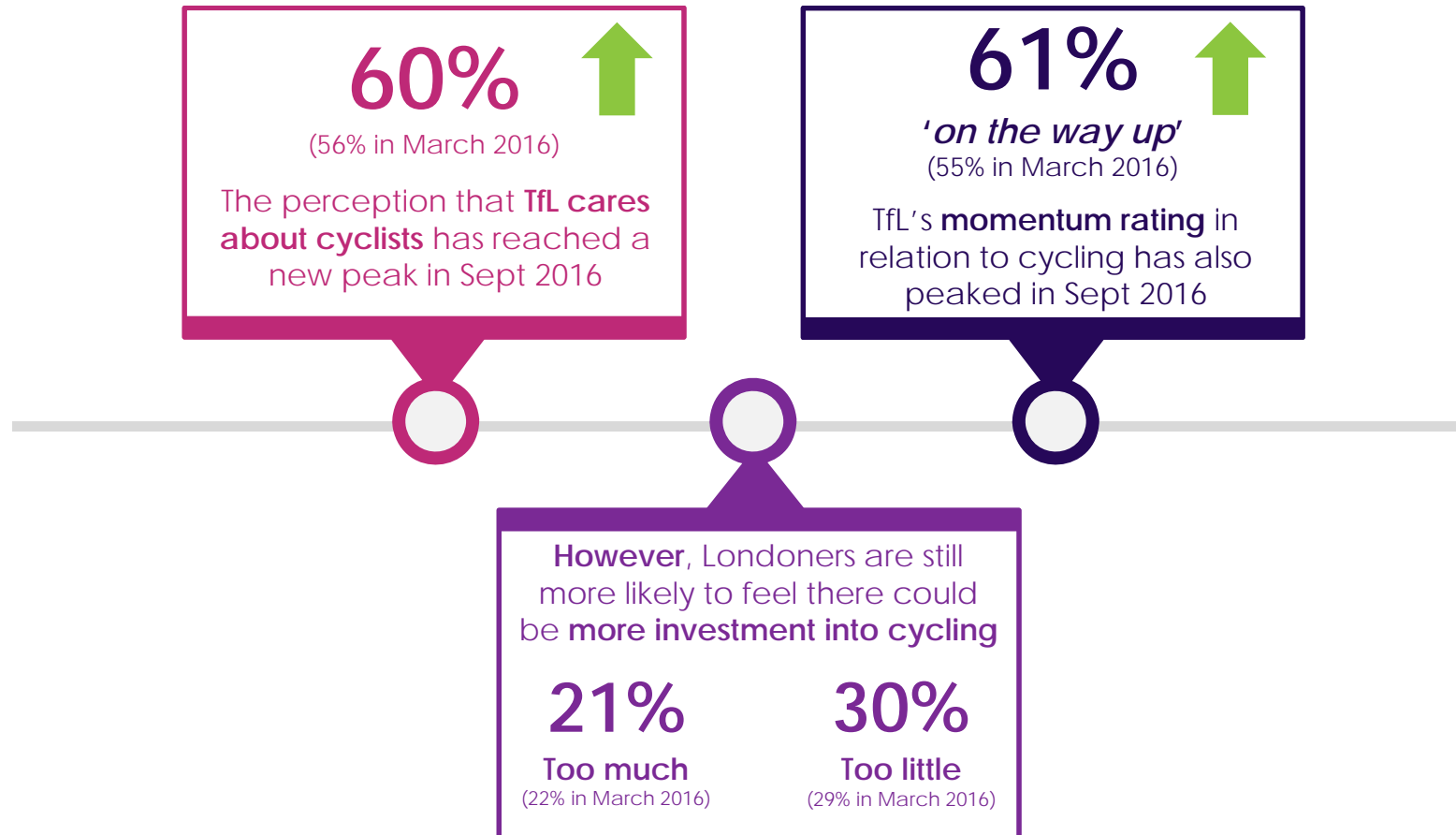
15%

Sept 2016



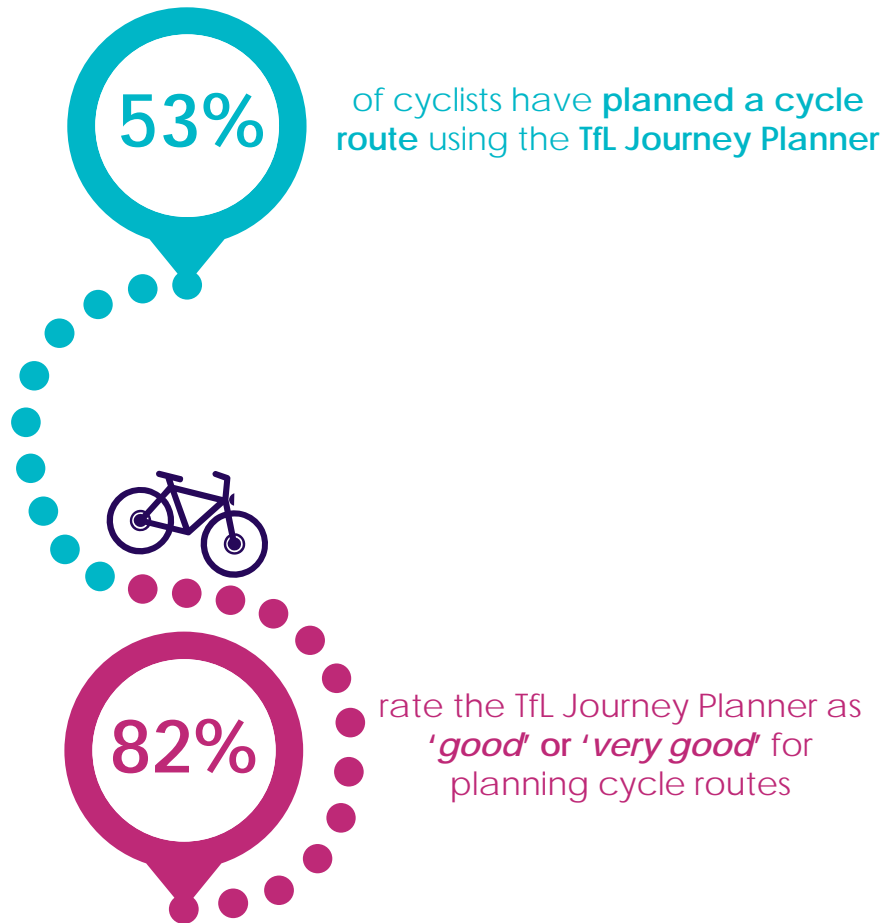
Perceptions of TfL in relation to cycling are largely positive, although Londoners are still more likely to feel there is too little investment in cycling rather than too much

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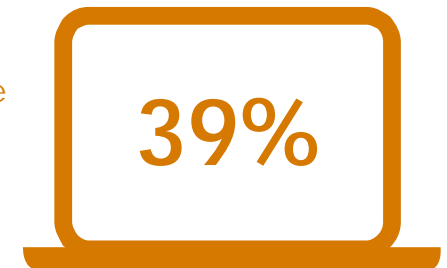




Cyclists who have used TfL's online cycling tools are generally happy with them, so encouraging increased use by highlighting their features could potentially get more Londoners cycling



And less than half of these have used the **dedicated cycling section** on the TfL website



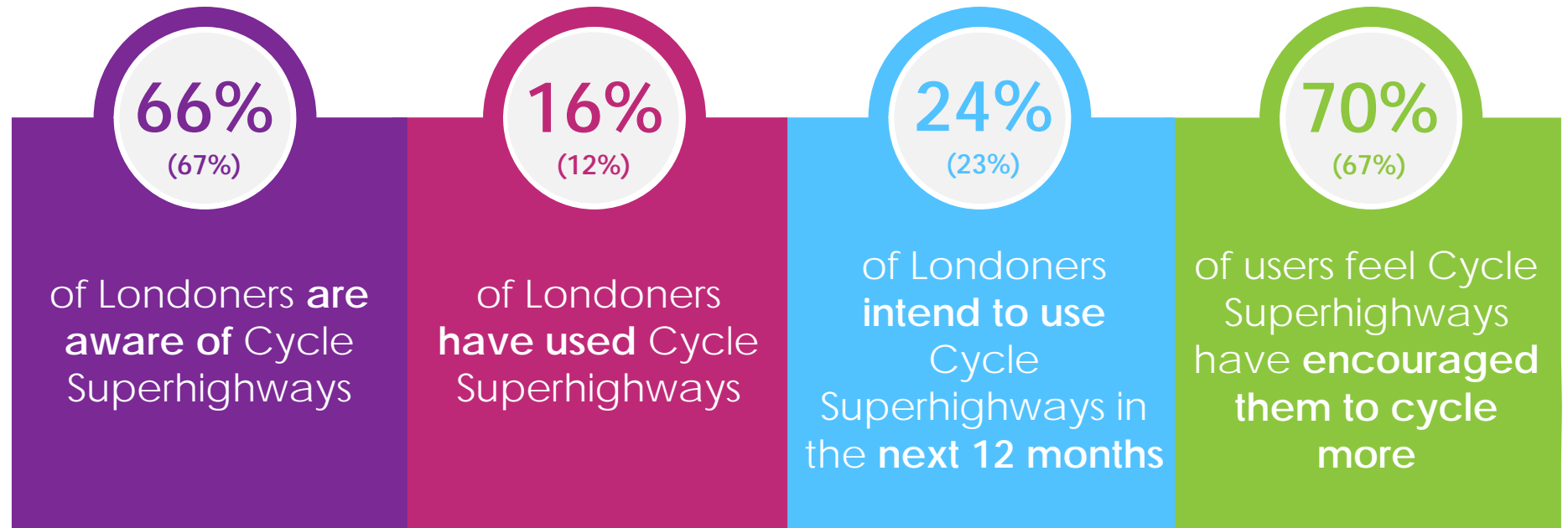


**CYCLE SUPERHIGHWAYS AND  
QUIETWAYS CAN PLAY A KEY ROLE  
IN INCREASING CYCLING LEVELS**



# Most Londoners who have used Cycle Superhighways feel they have been encouraged to cycle more

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March 2016  
figures in brackets

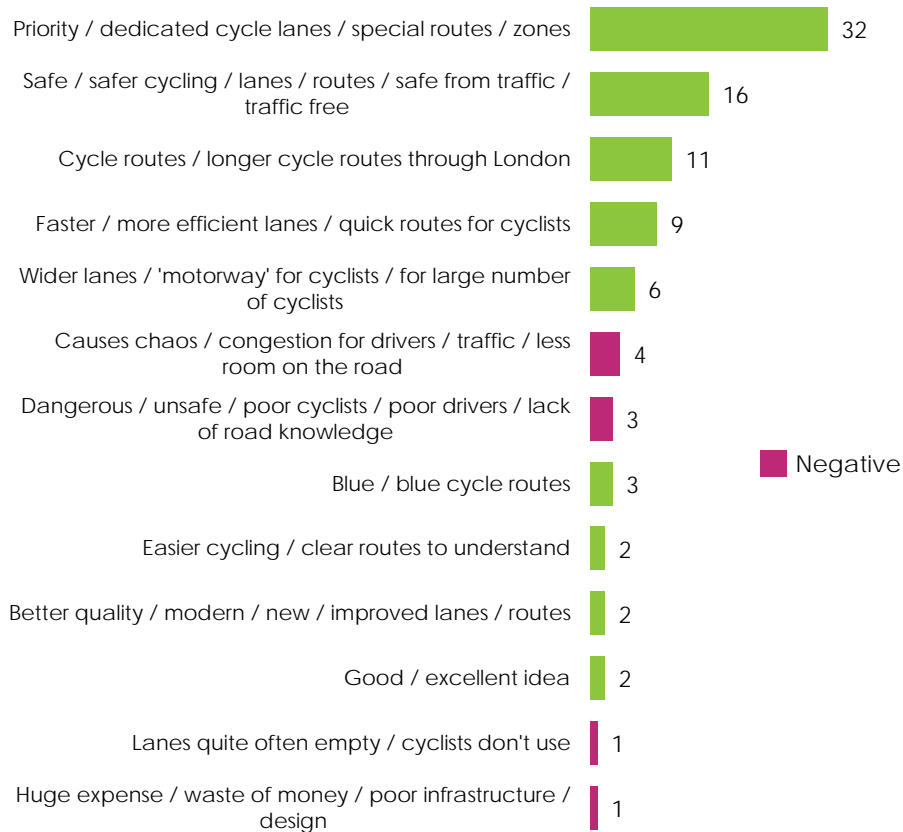




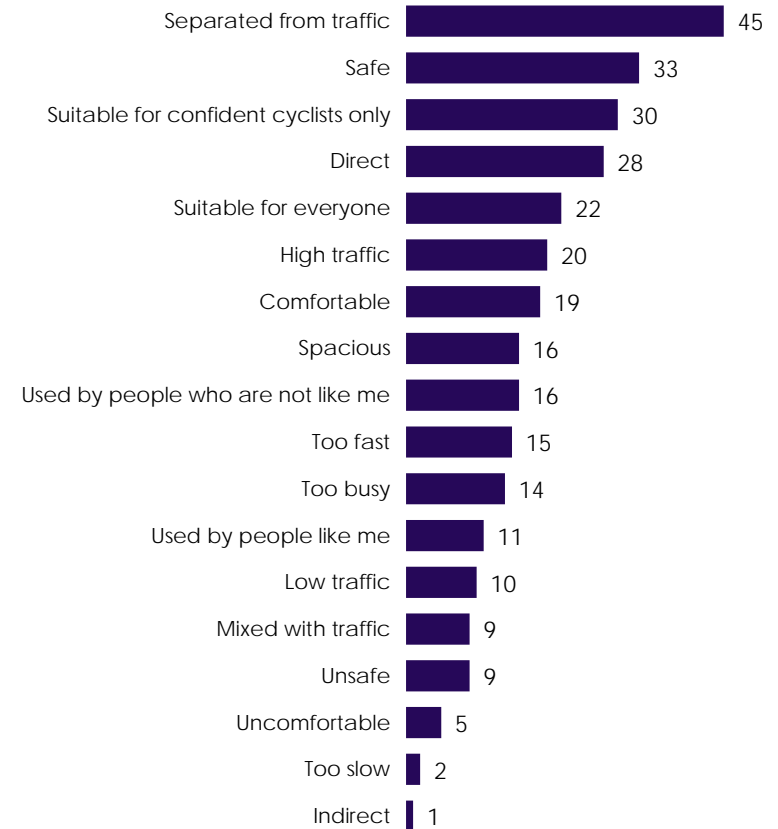
# Very few negative connotations with the name 'Cycle Superhighway'



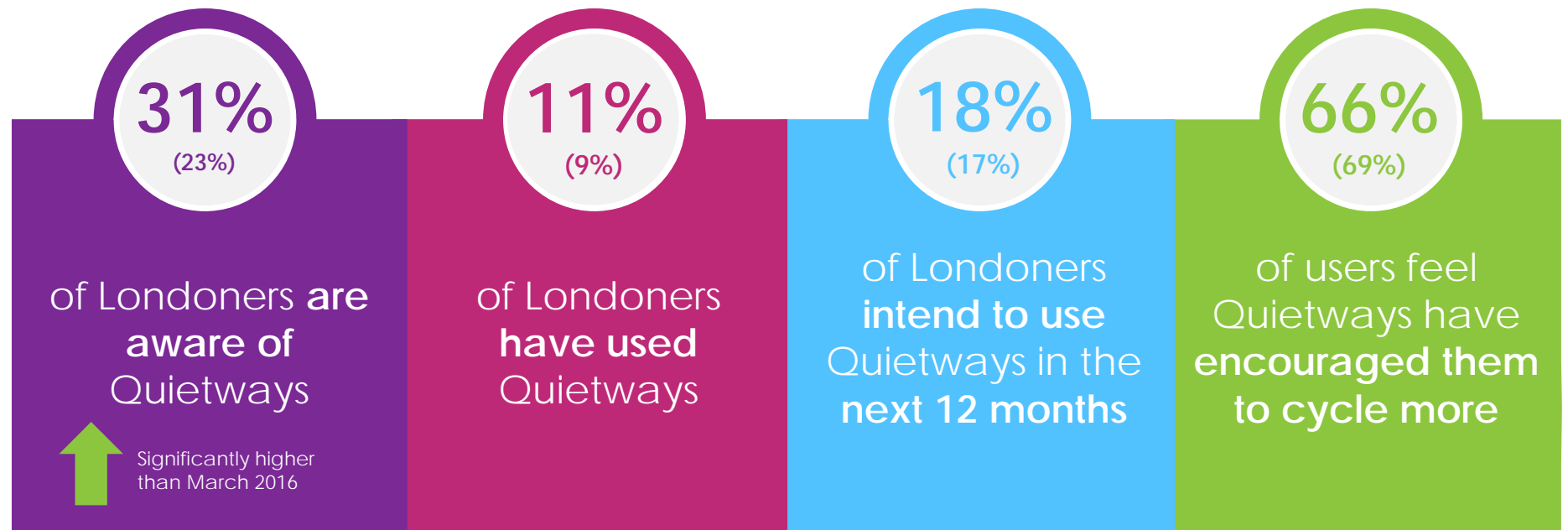
What does the name Cycle Superhighway mean to you?



Based on the name, would you say that Cycle Superhighways sound:



While Quietways are less well-known than Cycle Superhighways, they still appear to have a positive impact on users' cycling propensity



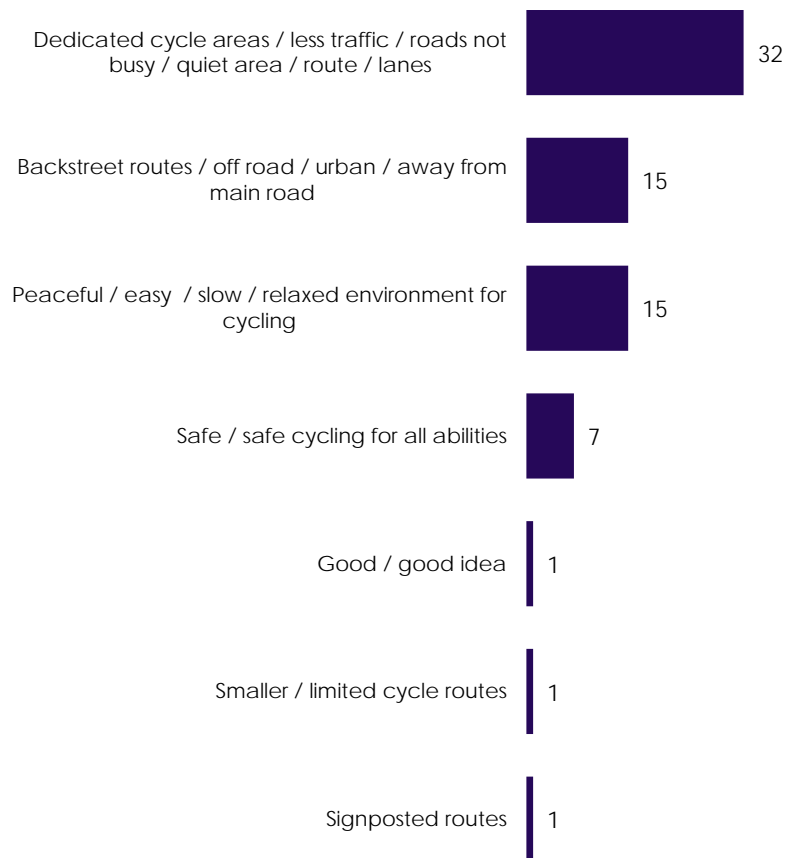
March 2016 figures in brackets



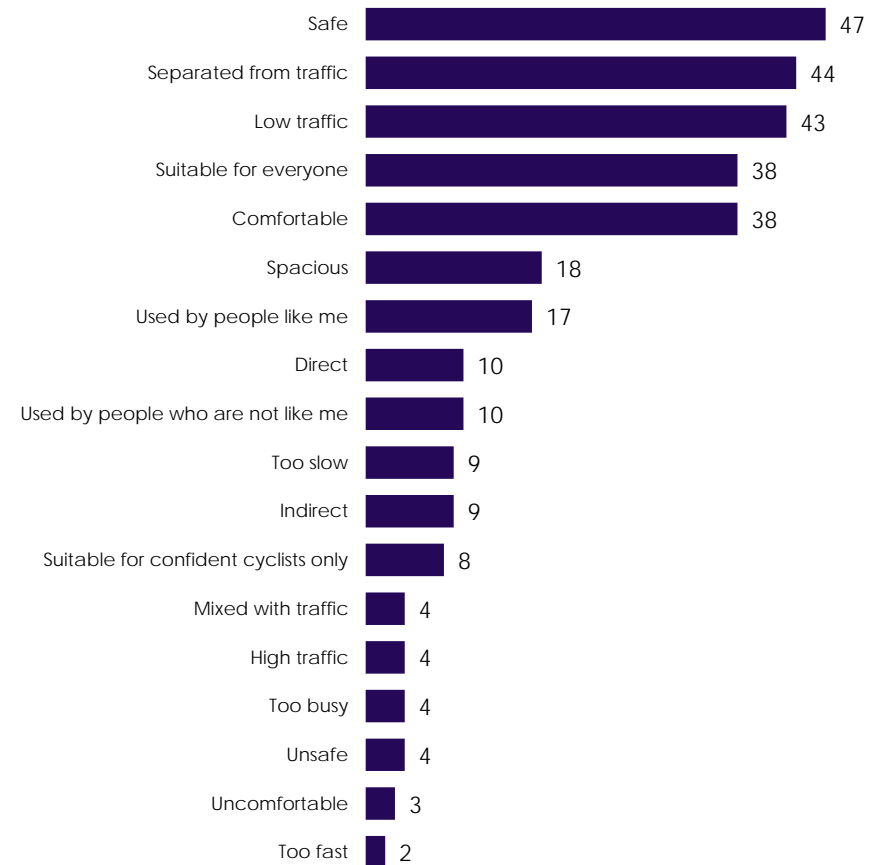
# Quietways are most likely to be associated with being safe and traffic-free



## What does the name Cycle Quietway mean to you?



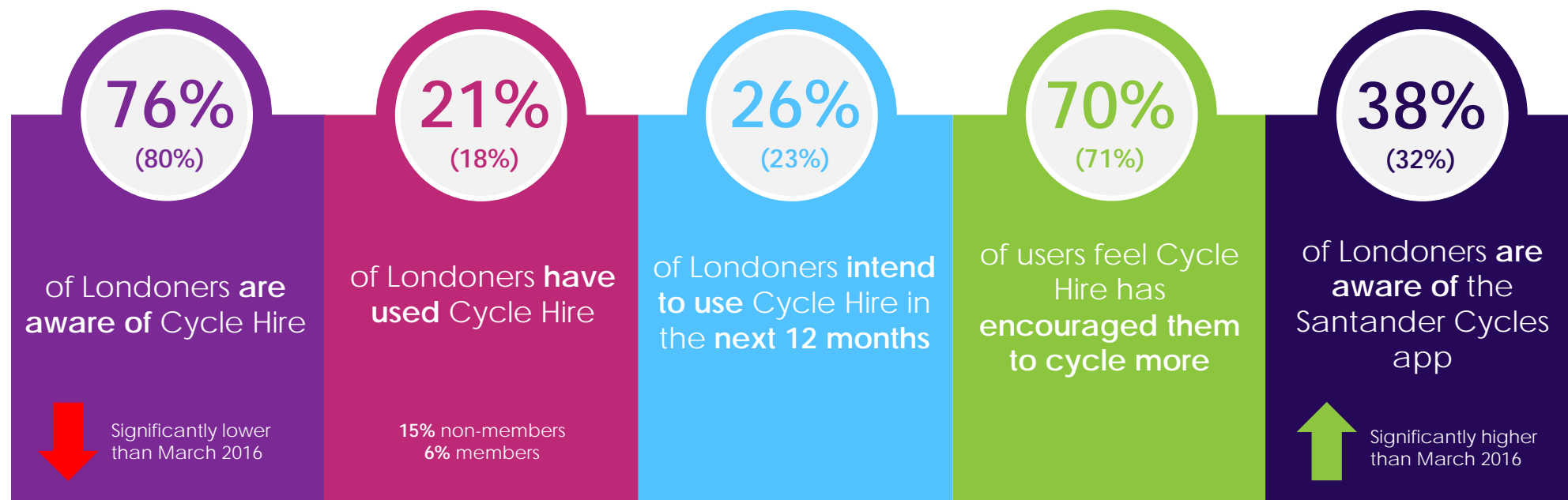
## Based on the name, would you say that Cycle Quietways sound:



# ENCOURAGING FURTHER USE OF CYCLE HIRE COULD POTENTIALLY RAISE CYCLING LEVELS



## Although awareness of Cycle Hire has fallen, users are still feeling encouraged to cycle more



March 2016  
figures in brackets

The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized letter 'A' or a similar abstract form, composed of several triangular and quadrilateral sections. The text 'Profile of cyclists and cycling behaviour' is centered horizontally and positioned in the middle of the green area.

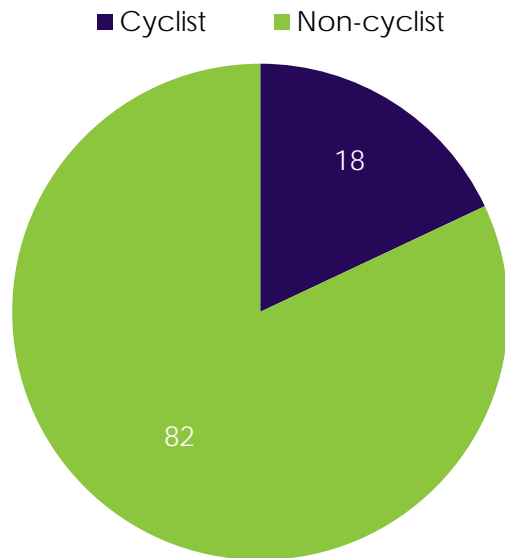
# Profile of cyclists and cycling behaviour



# Profile of cycling (Sept 2016)



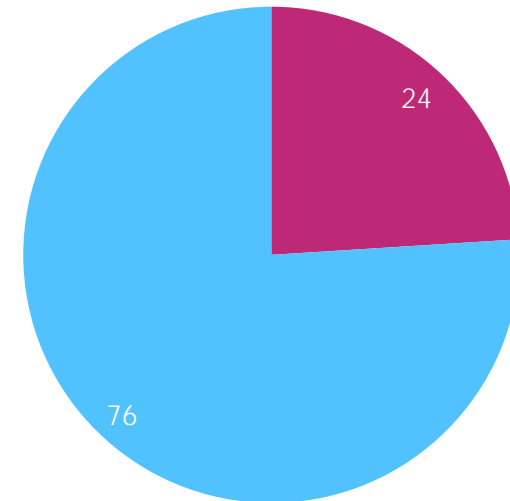
## Cyclists and non-cyclists (%)



Cyclists are those who have cycled in London in the last 12 months. Non-cyclists never use a bike to get around London

## Breakdown of regular and occasional cyclists (%)

Occasional cyclist Regular cyclist



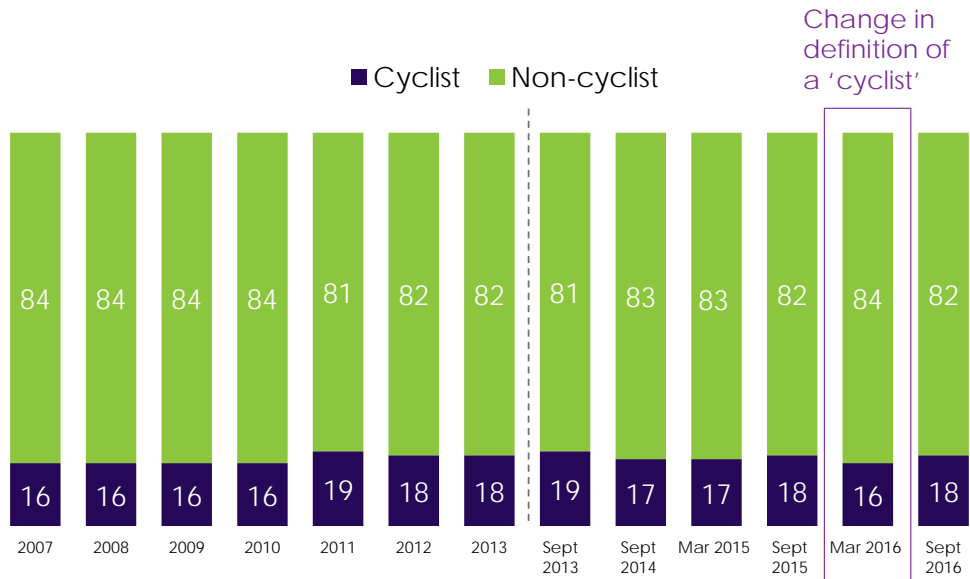
Regular cyclists are defined as cycling at least once a week. Occasional cyclists cycle less often than once a week

QFRE0: Which of these modes of transport do you ever use to get around London? Base: all (2315)  
QFRE0\_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists (507)

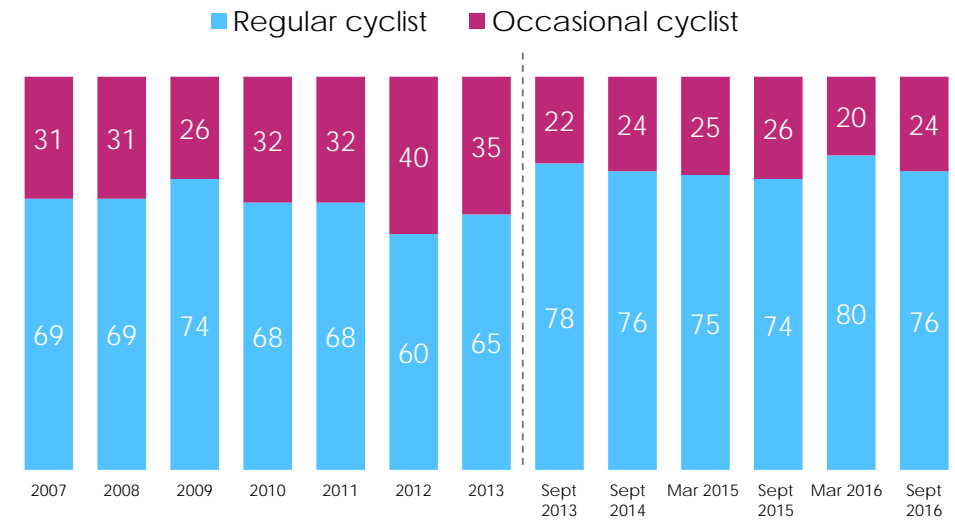
# Profile of cycling (trend)



%



## Cyclists and non-cyclists (%)



## Breakdown of regular and occasional cyclists (%)



  Significantly higher / lower vs. subgroup

  Significantly up or down vs. March 2016

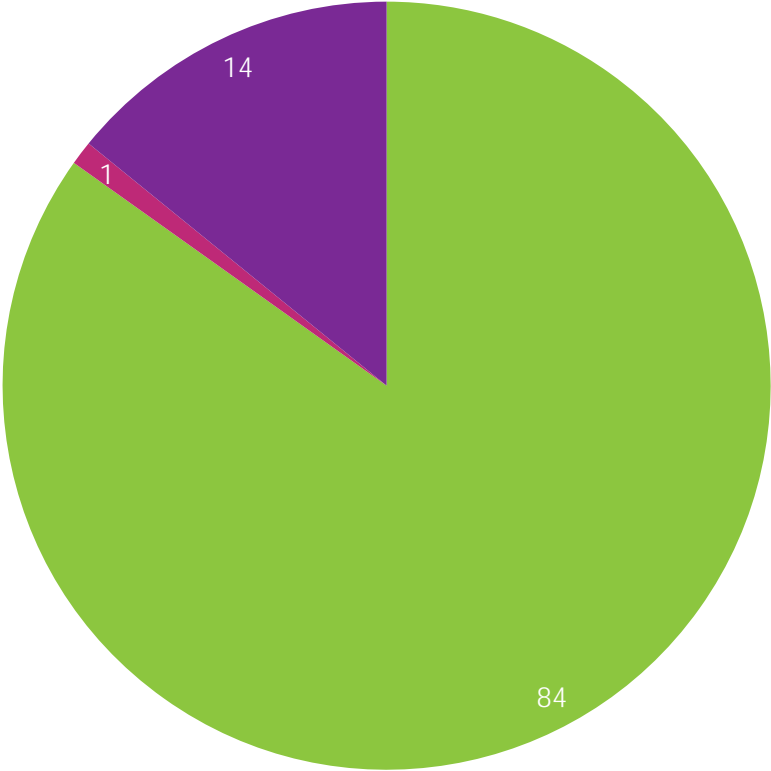
QFREQ: Which of these modes of transport do you ever use to get around London? Base: all – Sept 2015 (2315), Mar 2016 (2344) Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333), 2013 (1373), 2012 (1326), 2007-2011 (c1000)

QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London? Base: All cyclists – Sept 2016 (507), Mar 2016 (511) Sept 2015 (505), Mar 2015 (506), Sept 2014 (532), Sept 2013 (509), 2013 (532), 2012 (508), 2007-2011 (c170)

# Type of bicycle used



Type of bicycle used



■ Pedal bike only ■ E-bike only ■ Both

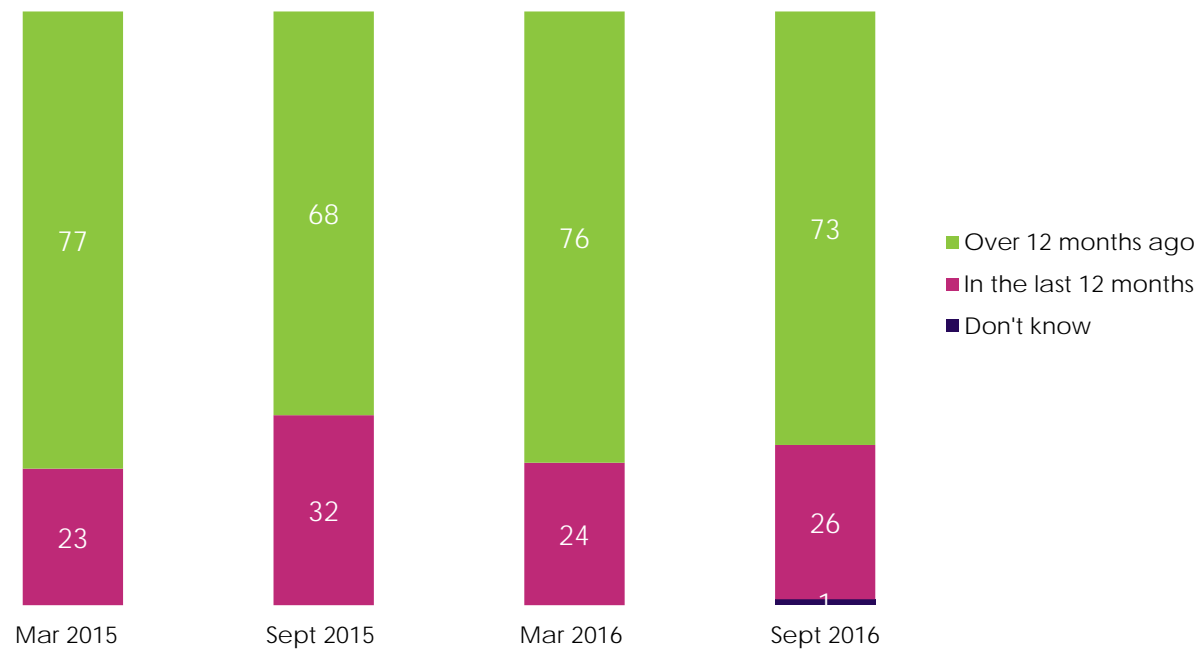
QEBIKE1. Do you use an e-bike or a regular pedal bike? Base: All cyclists (507)



# Cycling history



## When started cycling (%)



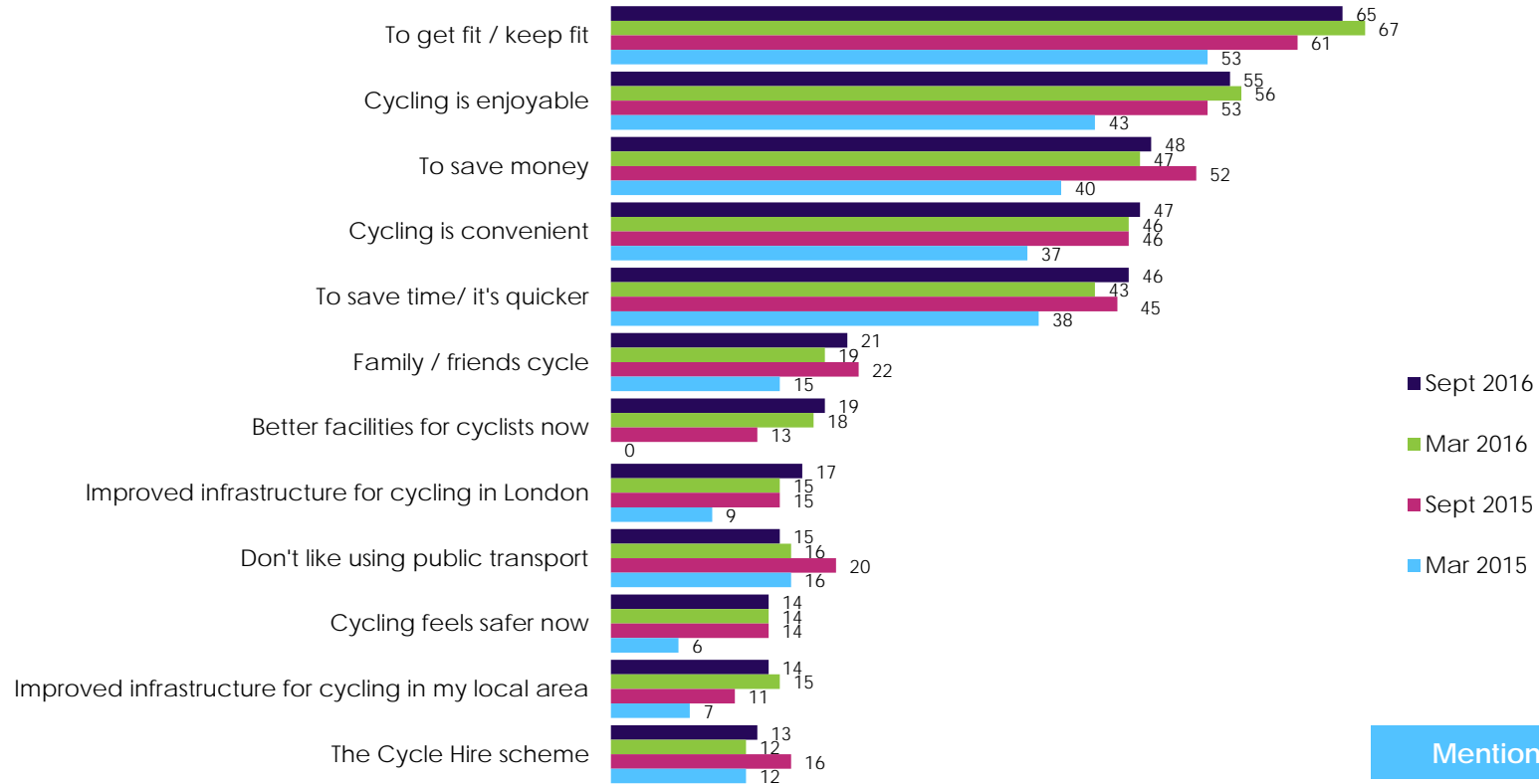
↓ ↑ Significantly up or down vs. March 2016

Y1. When did you start cycling? Base: All who ever use a bike to get around London Sept 2016 (518), Mar 2016 (525) Sept 2015 (505), Mar 2015 (510), Sept 2014 (524)





# Reasons to start cycling



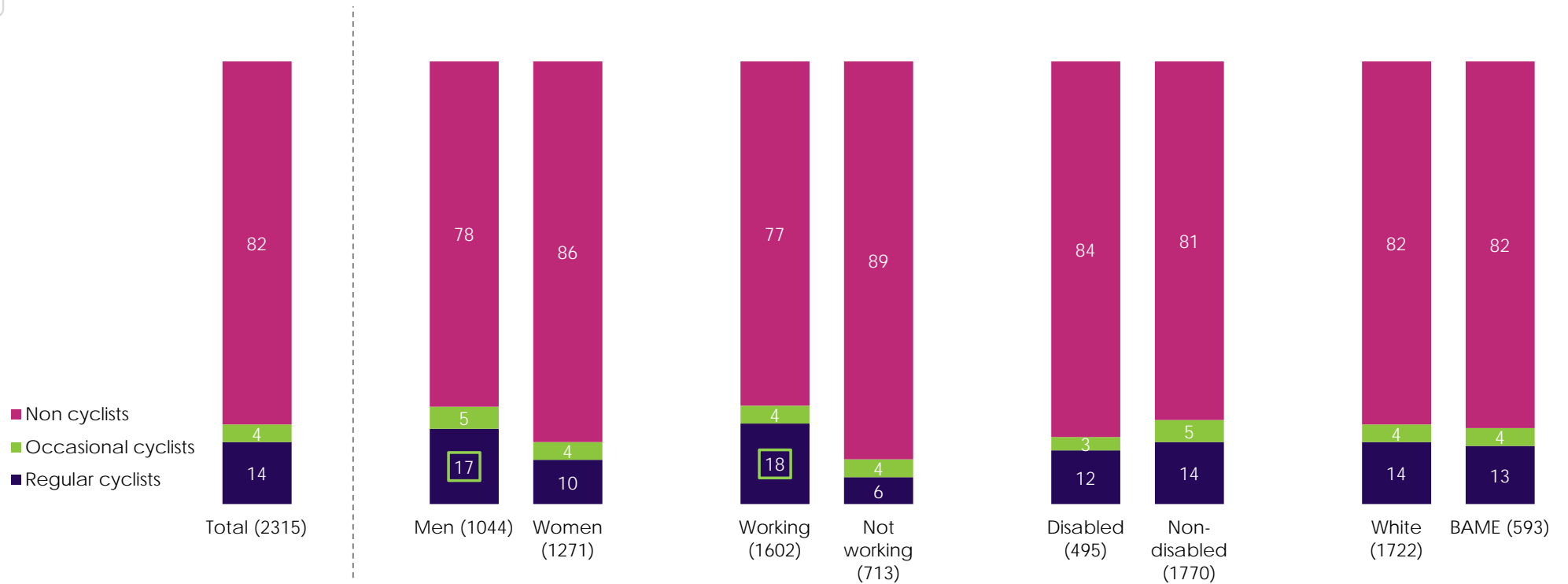
Mentions over 12% shown

Significantly up or down vs. March 2016

C6: What prompted you to start cycling? Base: All cyclists Sept 2016 (507), Mar 2016 (511), Sept 2015 (505), Mar 2015 (506), Sept 2014 (523)

# Profile of cyclists (Sept 2016)

%

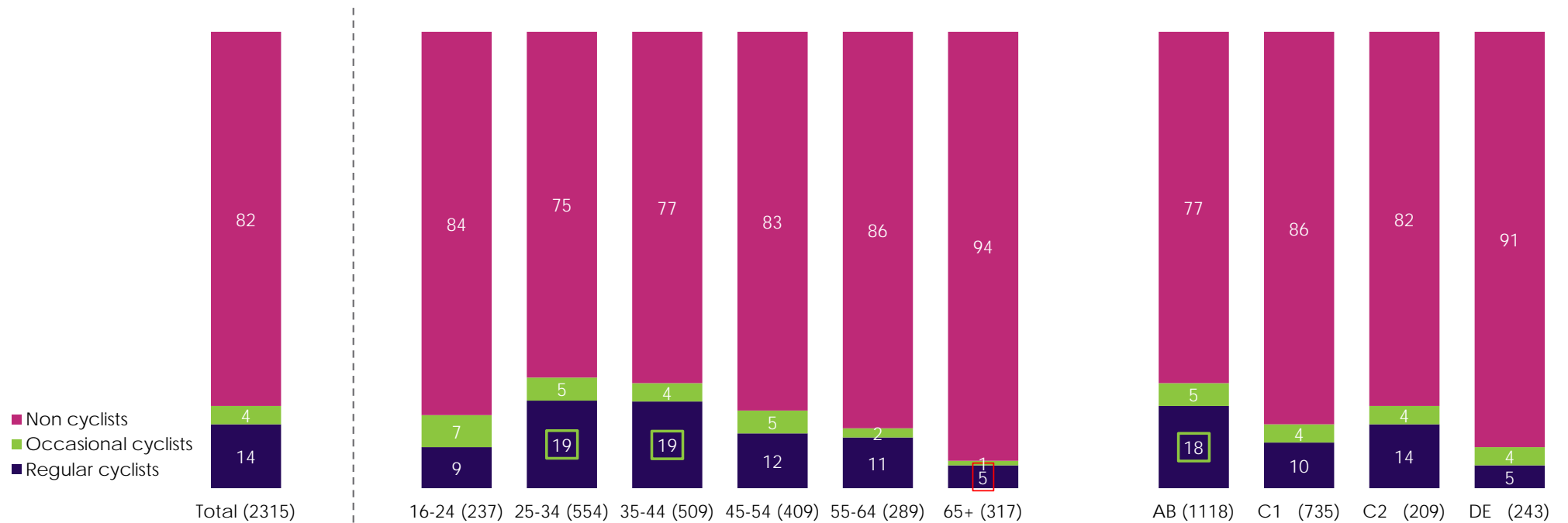




Significantly higher / lower vs. subgroup

Demographic questions  
Base: All - Sept 2016

# Profile of cyclists (Sept 2016)

%

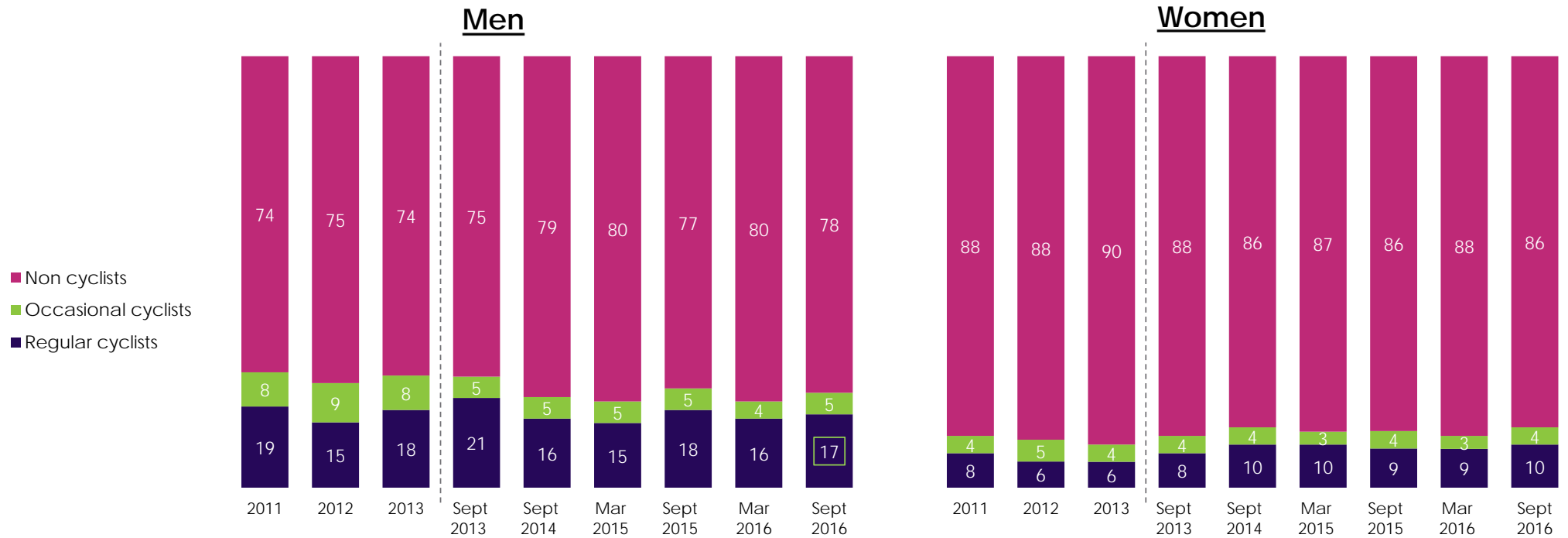


  Significantly higher / lower vs. subgroup

Demographic questions  
Base: All – Sept 2016



# Profile of cyclists (trend)



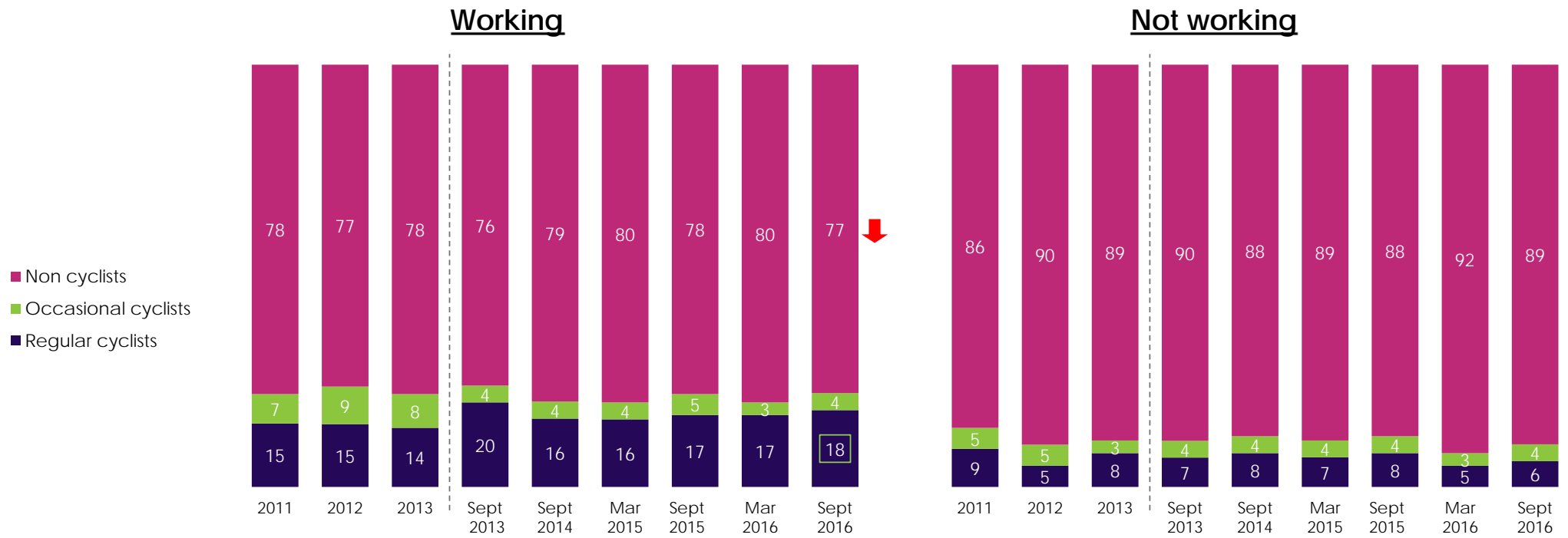
Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

Demographic questions  
 Base: All Sept 2016 Men (1044), Women (1271)



# Profile of cyclists (trend)



- Non cyclists
- Occasional cyclists
- Regular cyclists

Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

Demographic questions  
 Base: All Sept 2016 Working (1602), Not working (713)



# Profile of cyclists (trend)

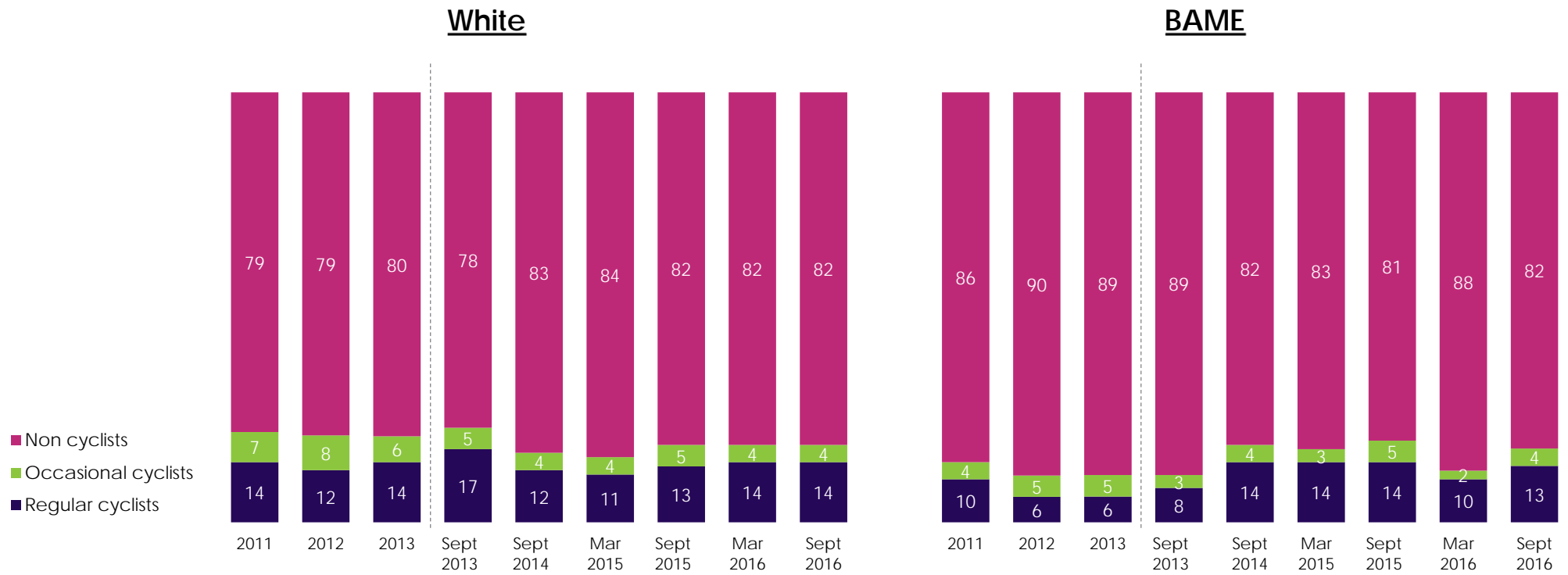


- Non cyclists
- Occasional cyclists
- Regular cyclists

 Significantly higher / lower vs. subgroup
   Significantly up or down vs. March 2016

Demographic questions  
 Base: All Sept 2016 Disabled(495), Non-disabled (1770)

# Profile of cyclists (trend)



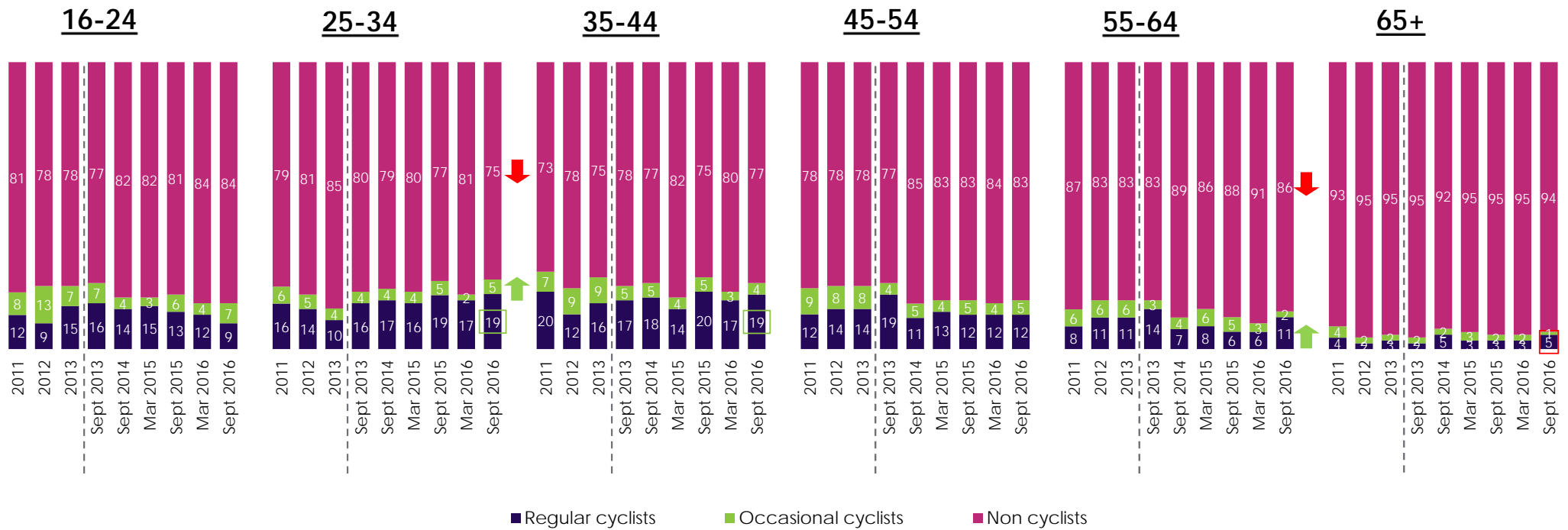
Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

Demographic questions  
 Base: All Sept 2016 White (1772), BAME (593)

# Profile of cyclists (trend)

%



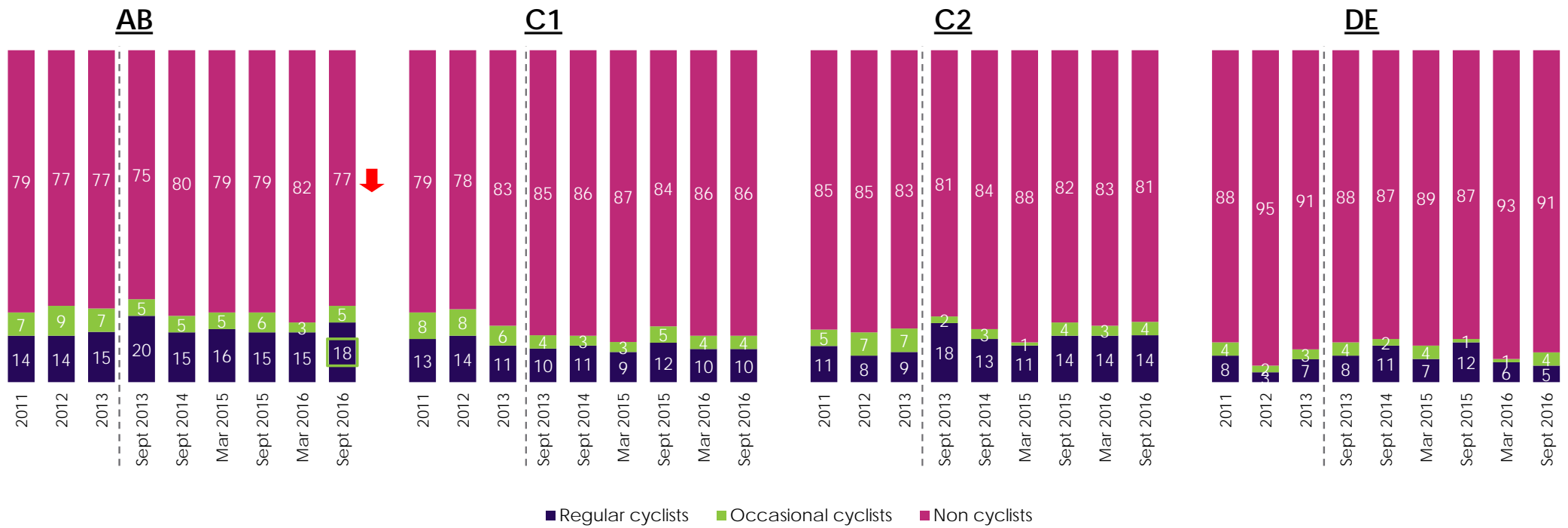
□ Significantly higher / lower vs. subgroup
 
↓ ↑ Significantly up or down vs. March 2016

Demographic questions

Base: All Sept 2016 16-24 (237), 25-34 (554), 35-44 (509), 45-54 (409), 55-64 (289), 65+ (317)

# Profile of cyclists (trend)

%



⬇ ⬆ Significantly higher / lower vs. subgroup     
 ⬇ ⬆ Significantly up or down vs. March 2016

Details of SEG definitions can be found in the appendix

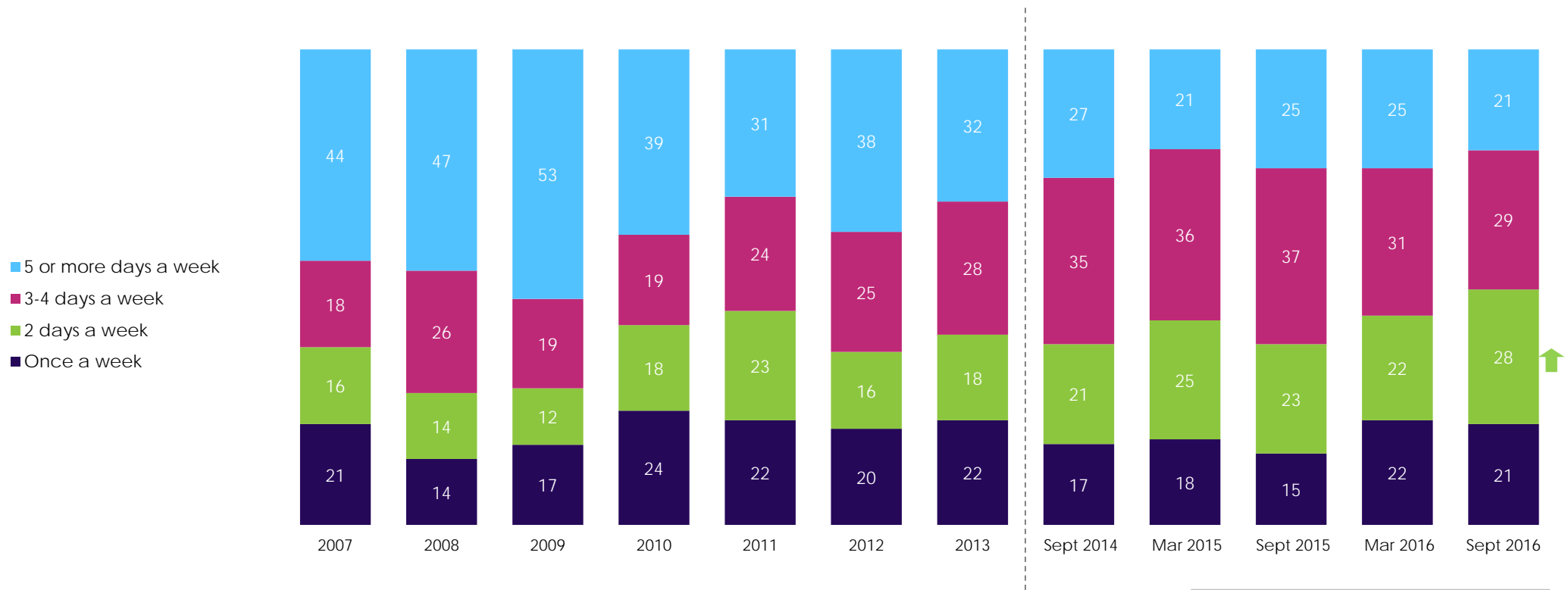
Demographic questions  
 Base: All Sept 2016 AB(1118), C1 (735), C2 (209), DE (243)





# Frequency of cycling among regular cyclists (trend)

%



↓
↑
 Significantly up or down vs. March 2016

OFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?

Base: Regular cyclists – Sept 2016 (393), Mar 2016 (408), Sept 2015 (369); Mar 2015 (376), Sept 2014 (395), Sept 2013 (387), 2013 (329), 2012 (292), 2011 (115), 2010 (107), 2009 (121), 2008 (110), 2007 (131)

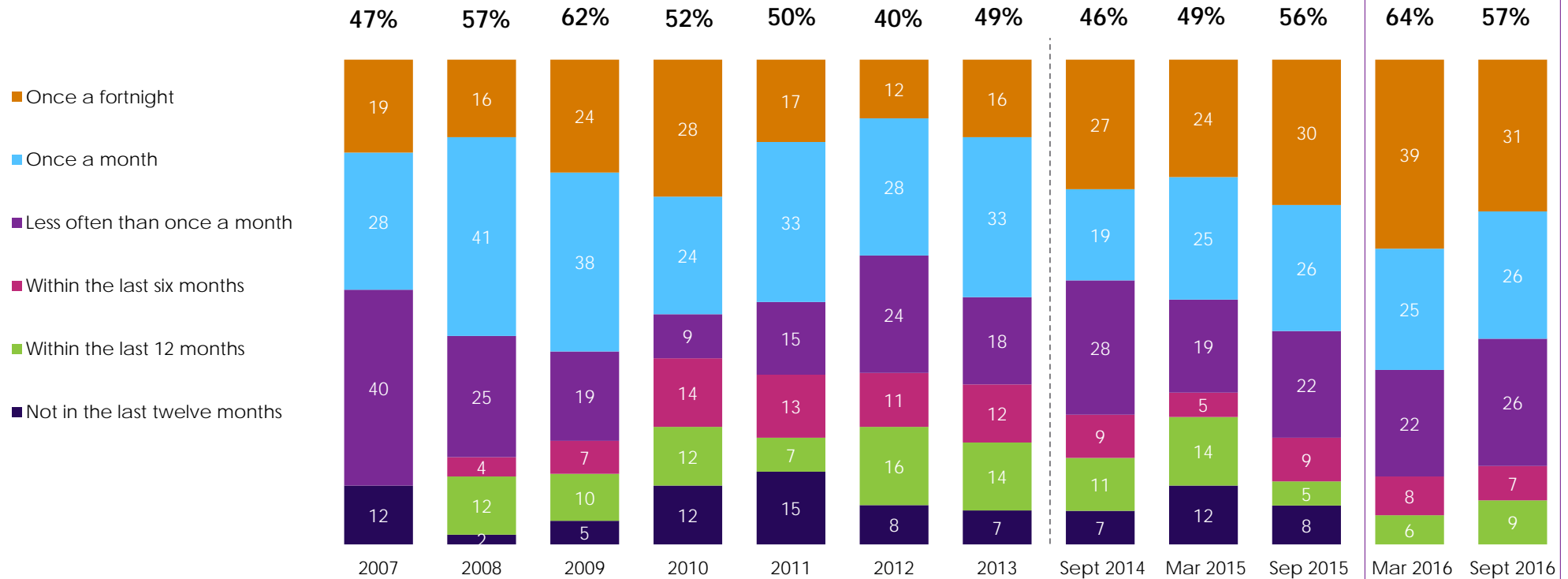


# Frequency of cycling among occasional cyclists (trend)

%

## At least once a month

Change in definition of a 'cyclist' so no one included in 'not in the last 12 months' data point



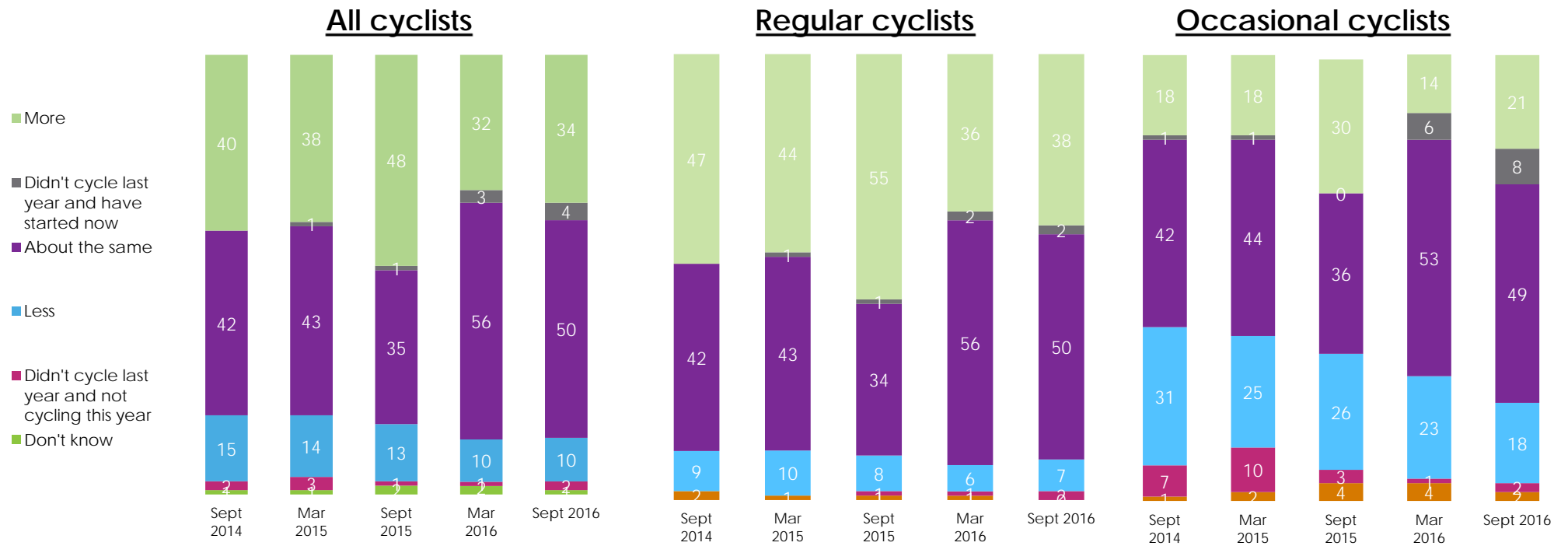
QFREQ\_BIKE: Typically, how often do you use a bicycle to get around London?



Base: Occasional cyclists – Sept 2016 (114), Mar 2016 (103), Sept 2015 (136); Mar 2015 (130), Sept 2014 (136), Sept 2013 (122), 2013 (203), 2012 (213), 2011 (61), 2010 (49), 2009 (42), 2008 (49), 2007 (57)

↓ ↑ Significantly up or down vs. March 2016

# Frequency of travelling by bike compared with last year

%





 Significantly up or down vs. March 2016

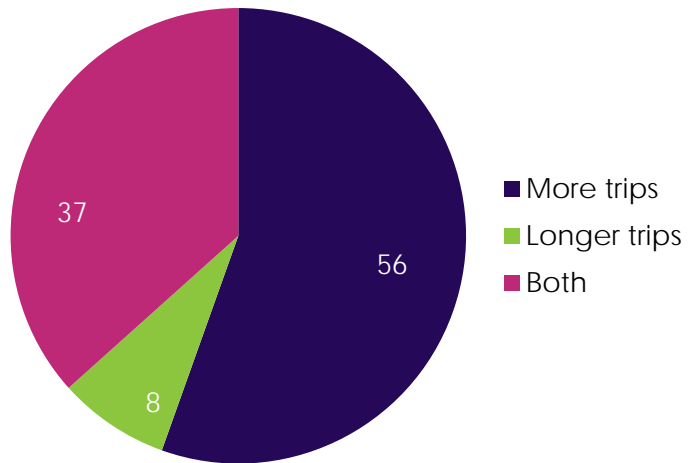
D1. How do you think the amount you cycle in London is compared to this time last year? Would you say you now cycle...?

Base: All cyclists – Sept 2016 (507), Mar 2016 (511), Sept 2015 (505), Sept 2014 (531); Regular cyclists – Sept 2016 (393), Mar 2016 (408), Sept 2015 (369), Sept 2014 (395); Occasional cyclists – Sept 2016 (114), Mar 2016 (103), Sept 2015 (136), (130), Sept 2014 (136)

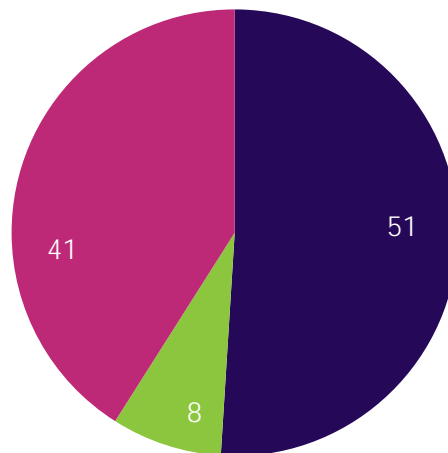
# How Londoners are cycling more



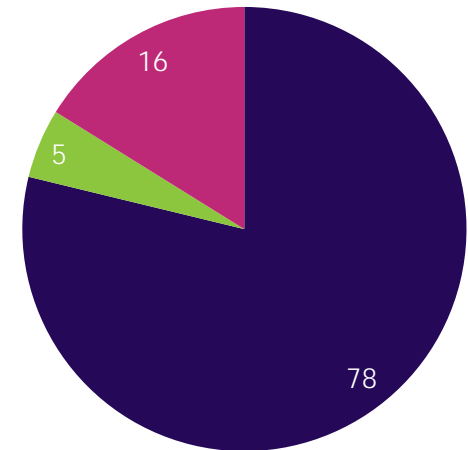
All cyclists cycling more (%)



Regular cyclists cycling more (%)



Occasional cyclists cycling more (%)



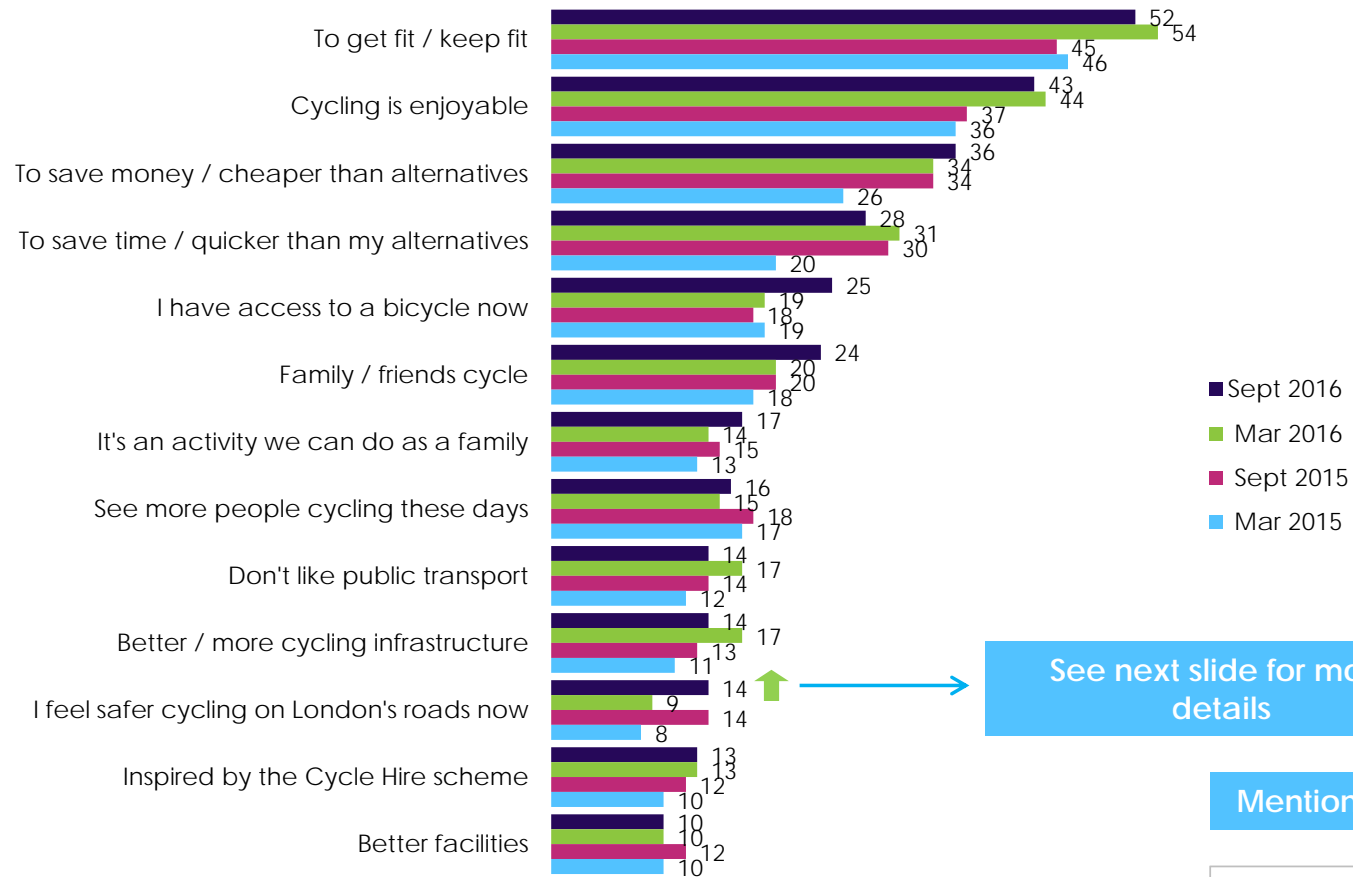
Caution: Low base for occasional cyclists

D1b: You have said you are cycling more. Would you say you are making more trips, longer trips or both?

Base: All cyclists travelling more by bike this year compared with last year – Sept 2016 (180), Regular cyclists (150), Occasional cyclists (30)



# Reasons for cycling more



See next slide for more details

Mentions above 10% shown

Significantly up or down vs. March 2016

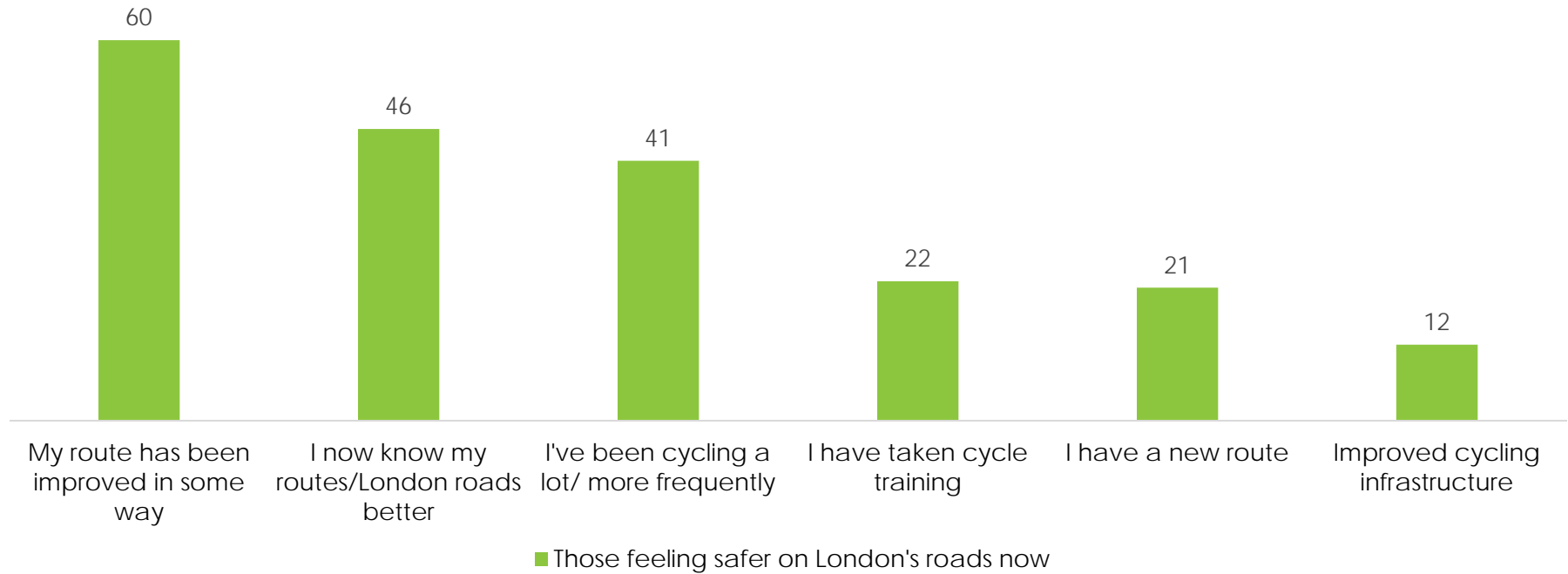
D2. What are the reasons that you have started cycling more this year?  
 Base: all cycling more Sept 2016 (373), Mar 2016 (316), Sept 2015 (461), Mar 2015 (429)



# Reasons for feeling safer on London's roads now



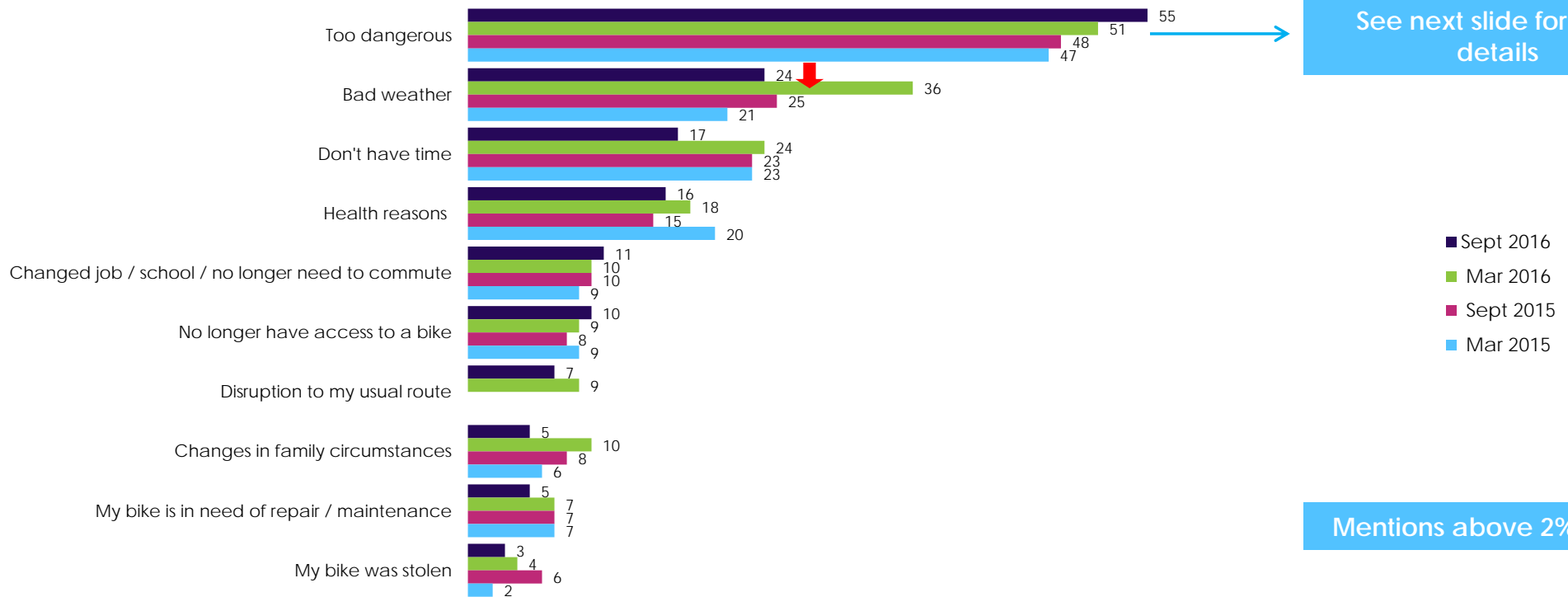
## Reasons for feeling safer on London's roads now



D2cNew. Which, if any, of the following reasons for feeling safer on London's roads apply to you? I feel safer because...

Base: Those who feel safer on London's roads now Sept 2016 (52)

# Reasons for cycling less



See next slide for more details

- Sept 2016
- Mar 2016
- Sept 2015
- Mar 2015



Mentions above 2% shown

Significantly up or down vs. March 2016

D4: What are the reasons that you are cycling less this year?  
 Base: All respondents who are cycling less this year Sept 2016 (177), Mar 2016 (172), Sept 2015 (214), Mar 2015 (220), Sept 2014 (242)

## Reasons for feeling cycling is dangerous

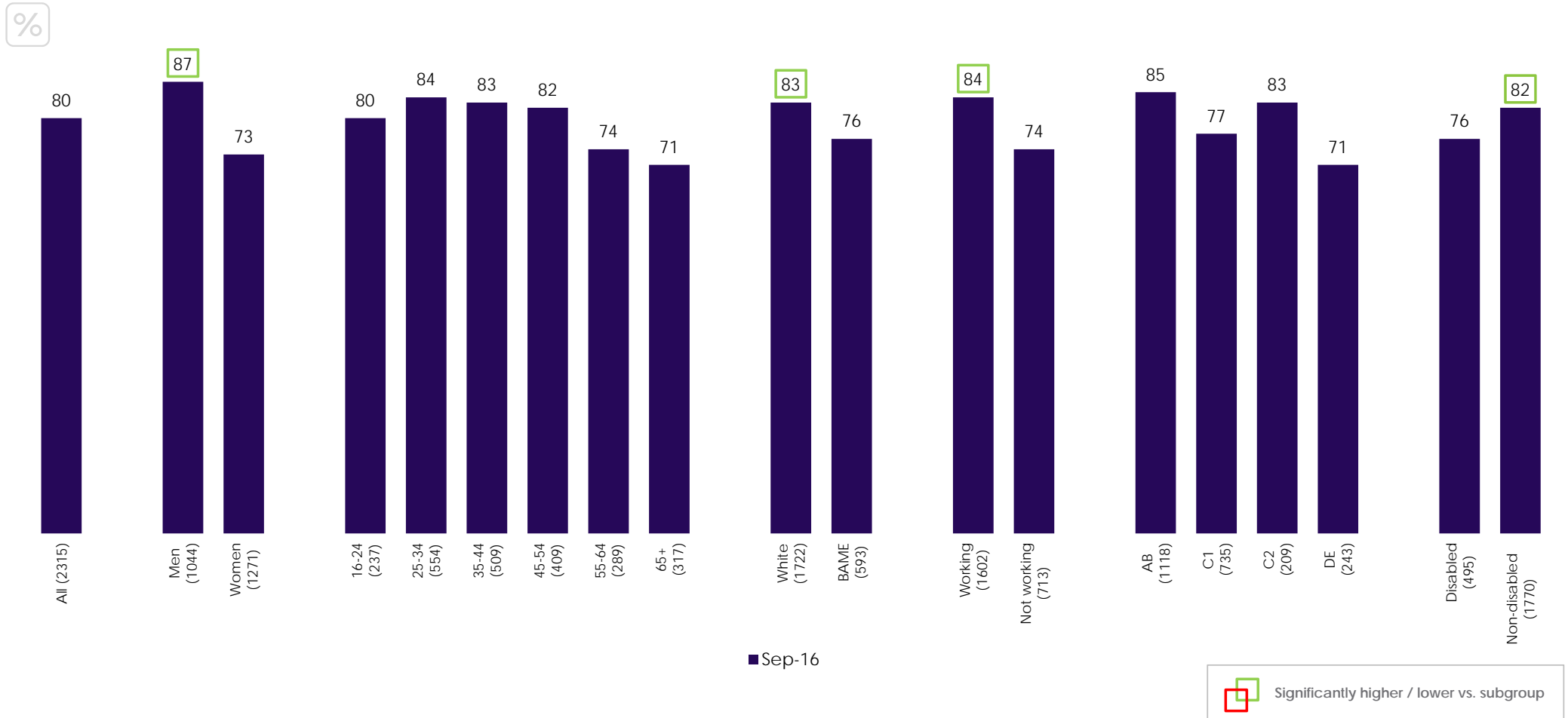
	Mar 2015 %	Sept 2015 %	Mar 2016 %	Sept 2016 %
Fear collisions	54	46	53	58
Traffic conditions are too busy	72	63	71	57 ↓
Conflict with other road users – motorists	n/a	47	46	47
Seen press about collisions involving cyclists	61	38	34	43
Witnessed a collision	32	29	31	32
I have had a near miss	26	24	26	30
I am not confident cycling	26	15	25	28
I do not know a safe route	22	16	22	21
Family member / friend was involved in a collision or near miss	n/a	9	6	21 ↑
Conflict with other cyclists	n/a	16	8	15
I have had a collision	6	8	17	10
Other road users' attitude to cyclists / inconsiderate	4	2	1	1
Other cyclists / poor attitude / lack of road safety knowledge	n/a	2	n/a	n/a

  Significantly up or down vs. March 2016

D5: Why do you feel that cycling is dangerous?

Base: All respondents who are cycling less this year because it is dangerous Sept 2016 (99), Mar 2016 (93), Sept 2015 (100), Mar 2015 (103), Sept 2014 (129)

# Percentage able to ride a bike (Sept 2016)

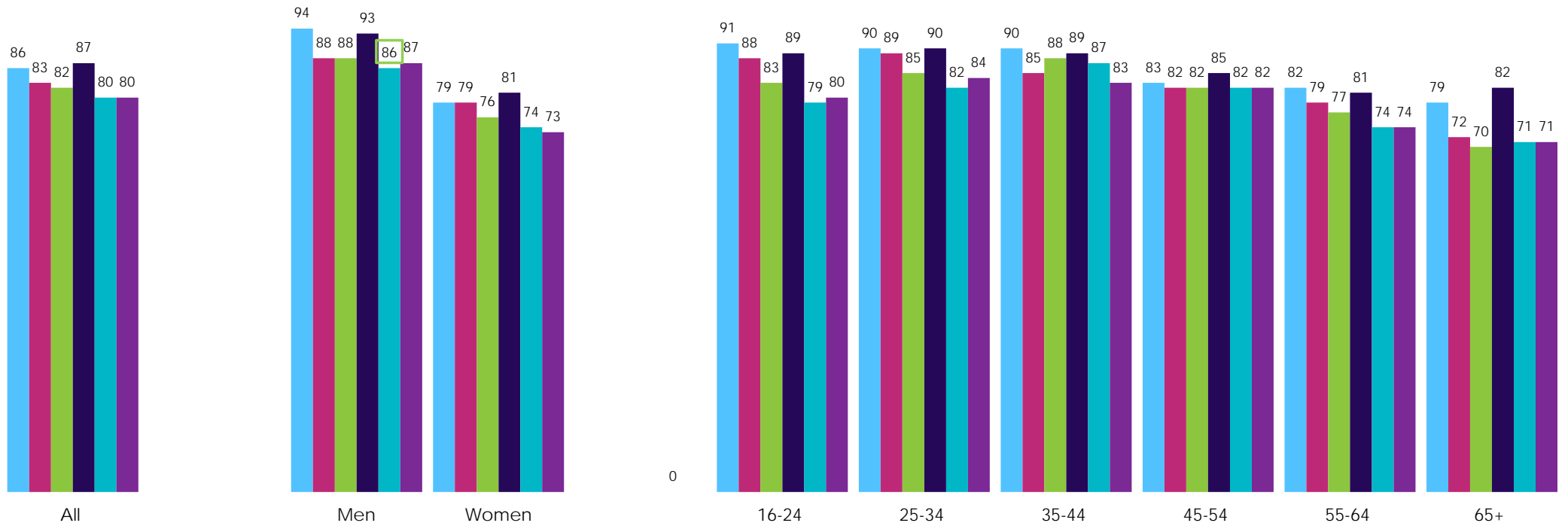


OBIKE1: Can you ride a bicycle?  
 Base: All respondents Sept 2016 (2315)

# Percentage able to ride a bike (trend)



■ Sept 2013 ■ Sept 2014 ■ Mar 2015 ■ Sept 2015 ■ Mar 2016 ■ Sept 2016



Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

QBIKE1: Can you ride a bicycle?

Base: All respondents Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192)

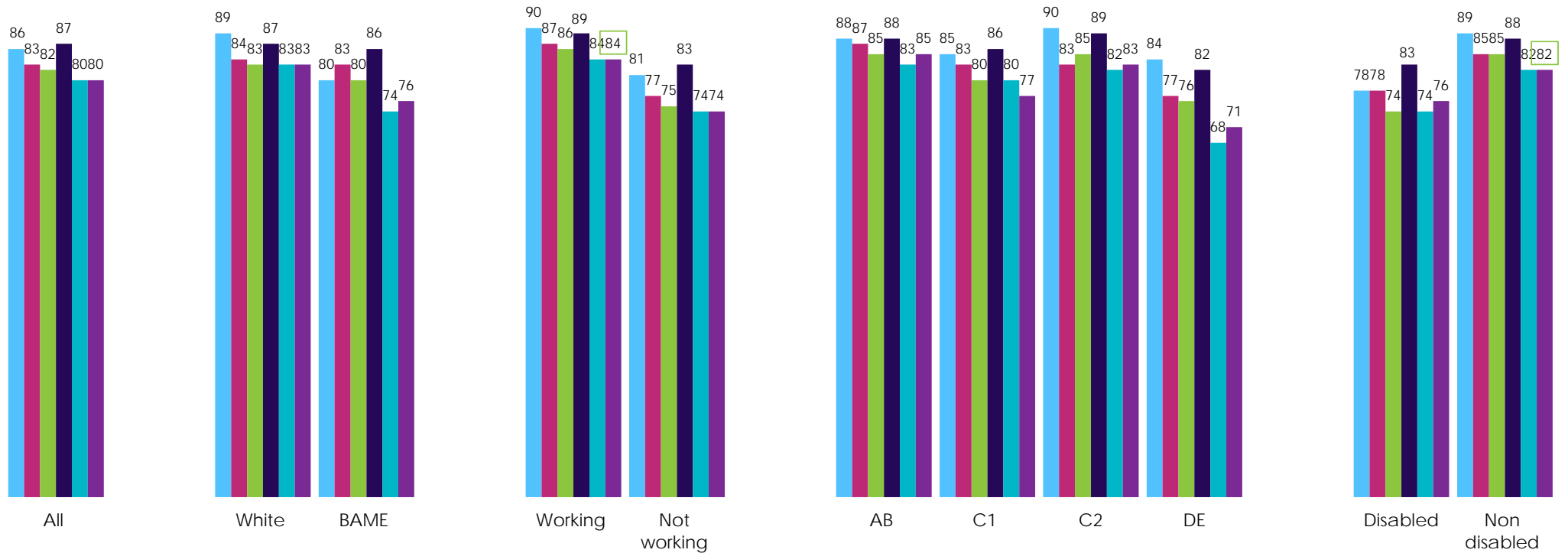




# Percentage able to ride a bike (trend)



■ Sept 2013 ■ Sept 2014 ■ Mar 2015 ■ Sept 2015 ■ Mar 2016 ■ Sept 2016



□ Significantly higher / lower vs. subgroup
 
↓ ↑ Significantly up or down vs. March 2016

QBIKE1: Can you ride a bicycle?

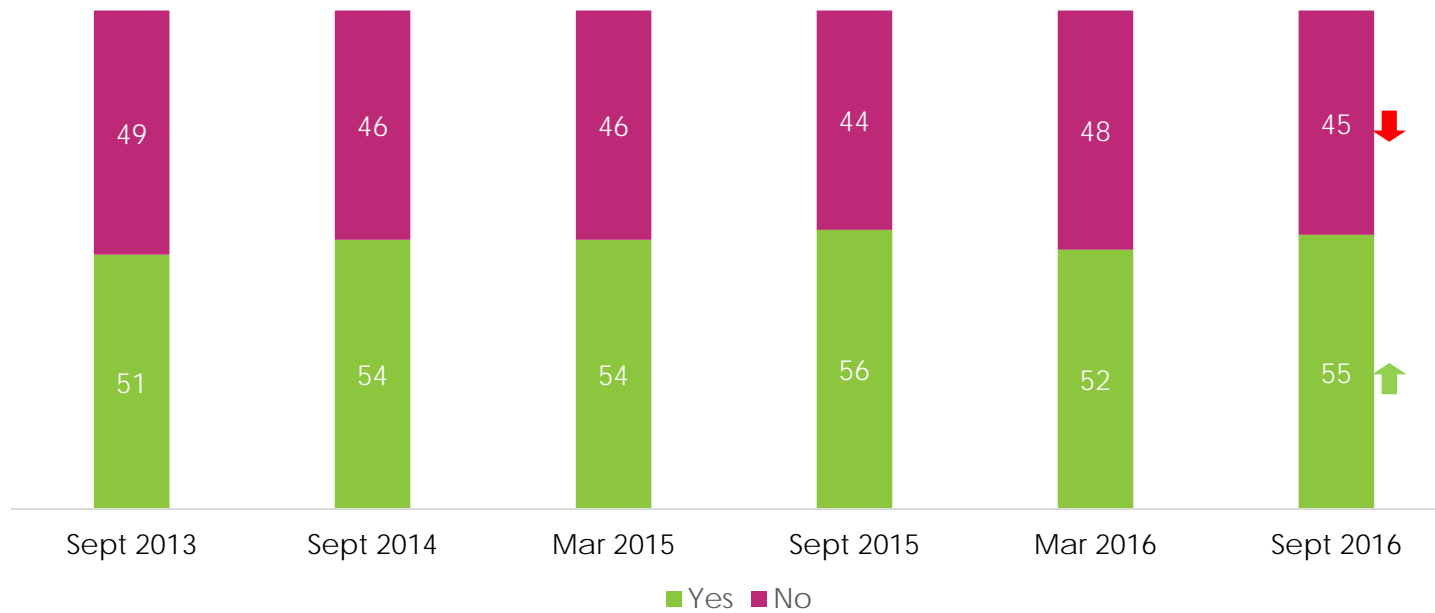
Base: All respondents Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192)





# Access to a bike in the household



**Access to a bike in the household – %**



  Significantly up or down vs. March 2016

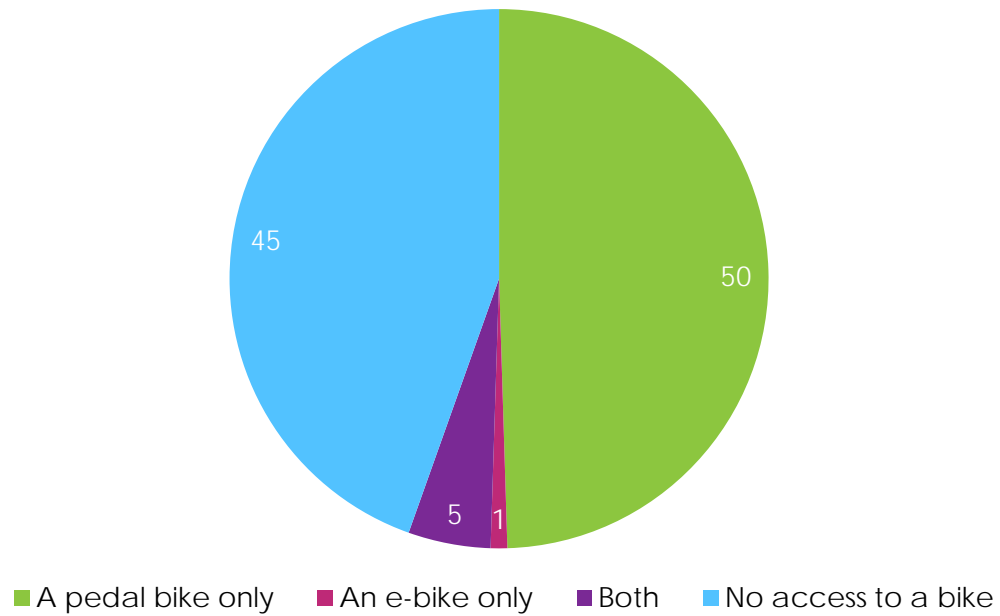
QACCESS1: Does your household have access to a bicycle, even if you don't currently use it?  
Base: all – Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333)



# Access to a bike in the household



**Access to a bike in the household – %**

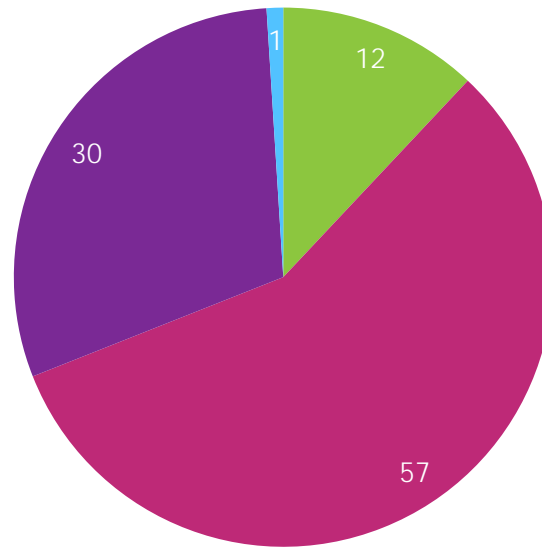


QACCESS2: Do you have access to...?  
Base: all – Sept 2016 (2315)

# Awareness and use of e-bikes



**Awareness and use of e-bikes – %**

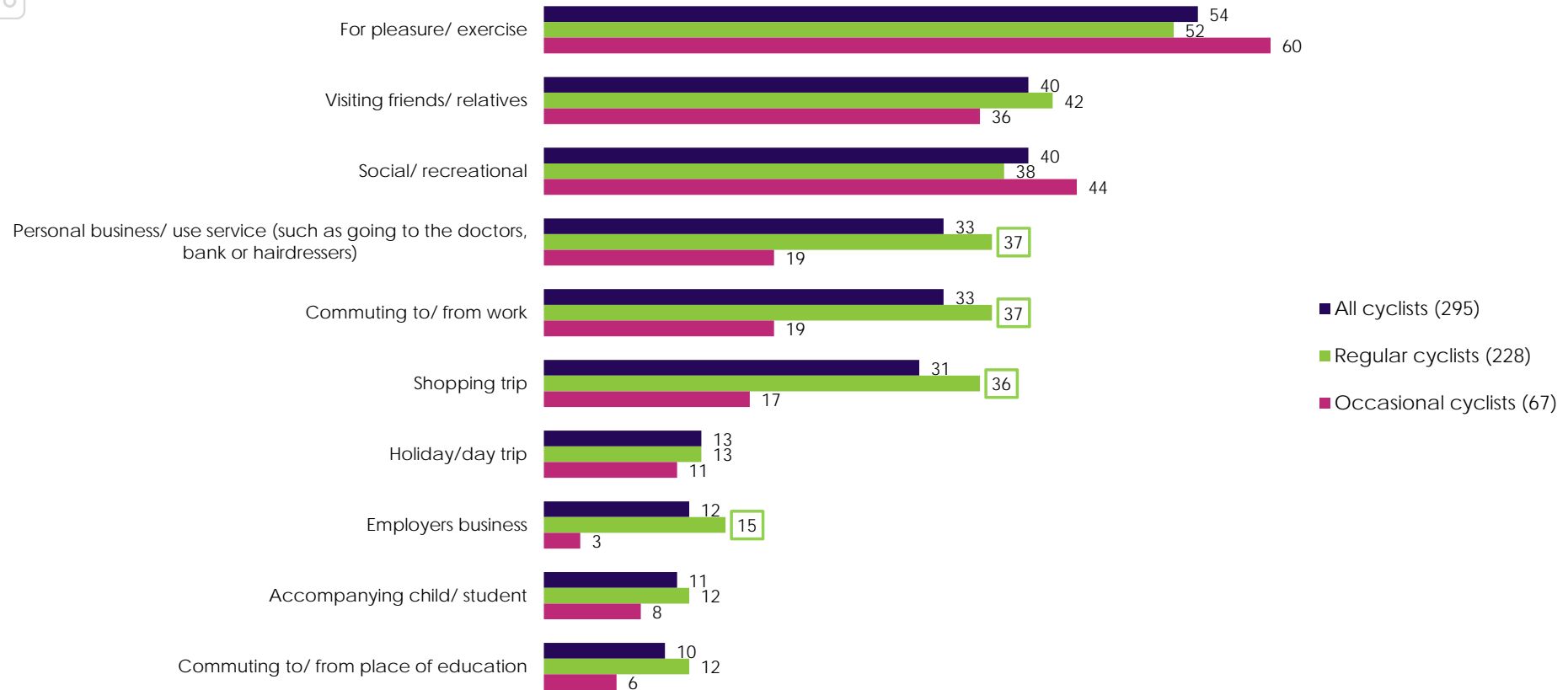


■ Yes, aware and I have used one ■ Yes, aware but I have not used one ■ No, I had not heard of e-bikes / electric bikes ■ Don't know

QEBIKE2. Before today, had you heard of a type of bike called an 'e-bike' or an 'electric bike'?  
Base: all – Sept 2016 (2315)



# Cycling for different journey purposes



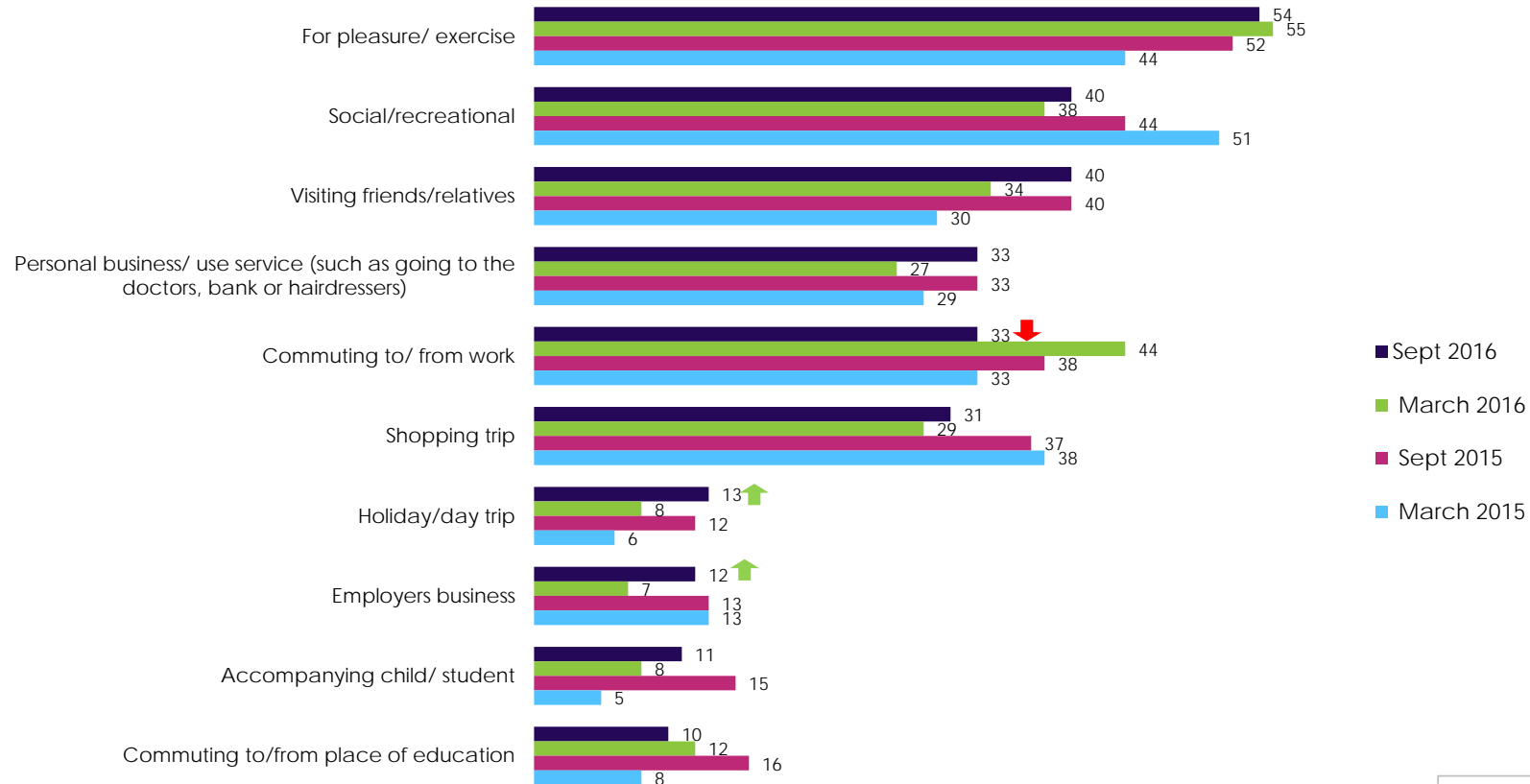
- All cyclists (295)
- Regular cyclists (228)
- Occasional cyclists (67)

Significantly higher / lower vs. subgroup

F1: What types of journey do you make by bicycle?  
 Base: All cyclists Sept 2016 (295)



# Cycling for different journey purposes over time

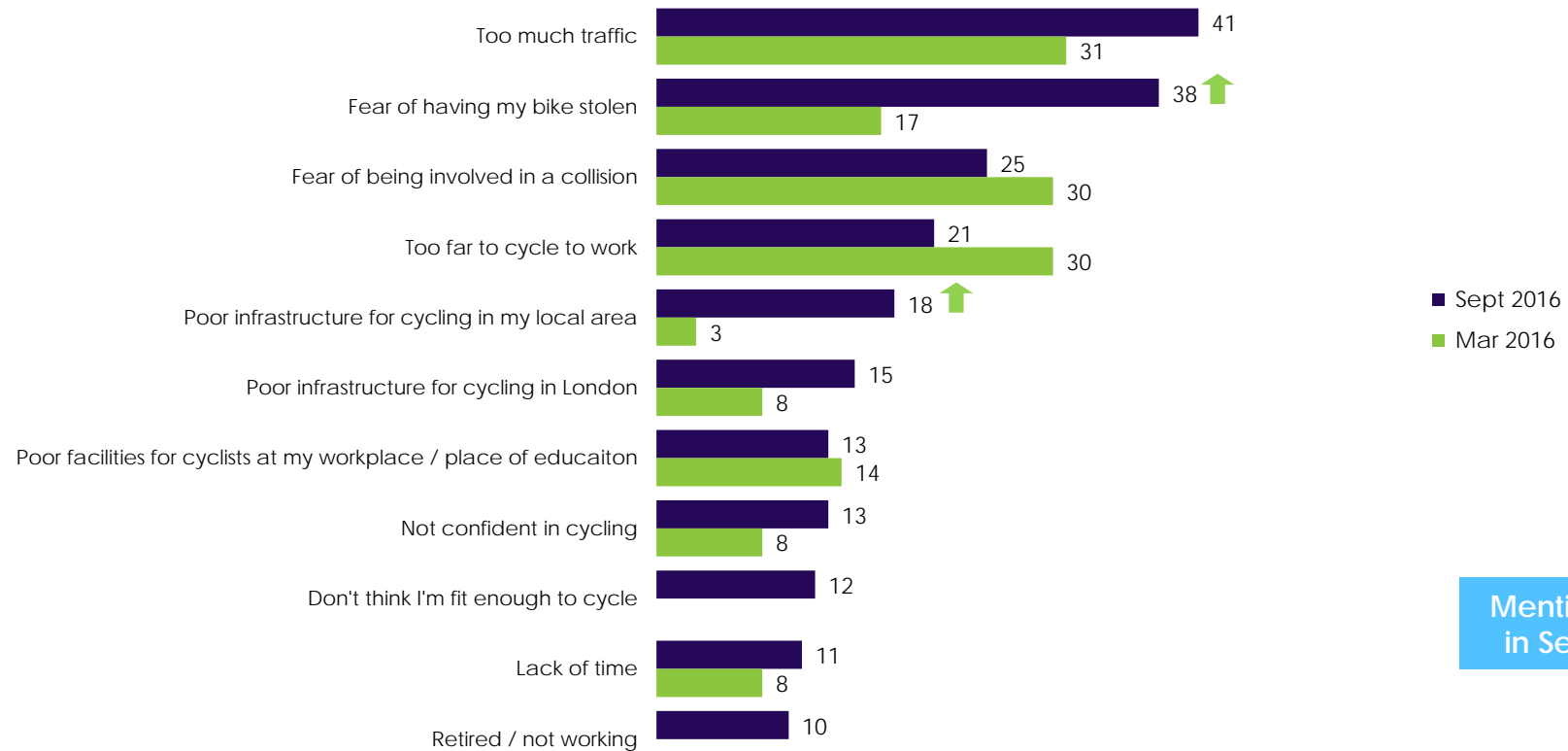


Significantly up or down vs. March 2016

F1: What types of journey do you make by bicycle?

Base: All cyclists Sept 2016 (295), March 2016 (306), Sept 2015 (267), March 2015 (284)

# Deterrents to cycling to / from workplace or place of education



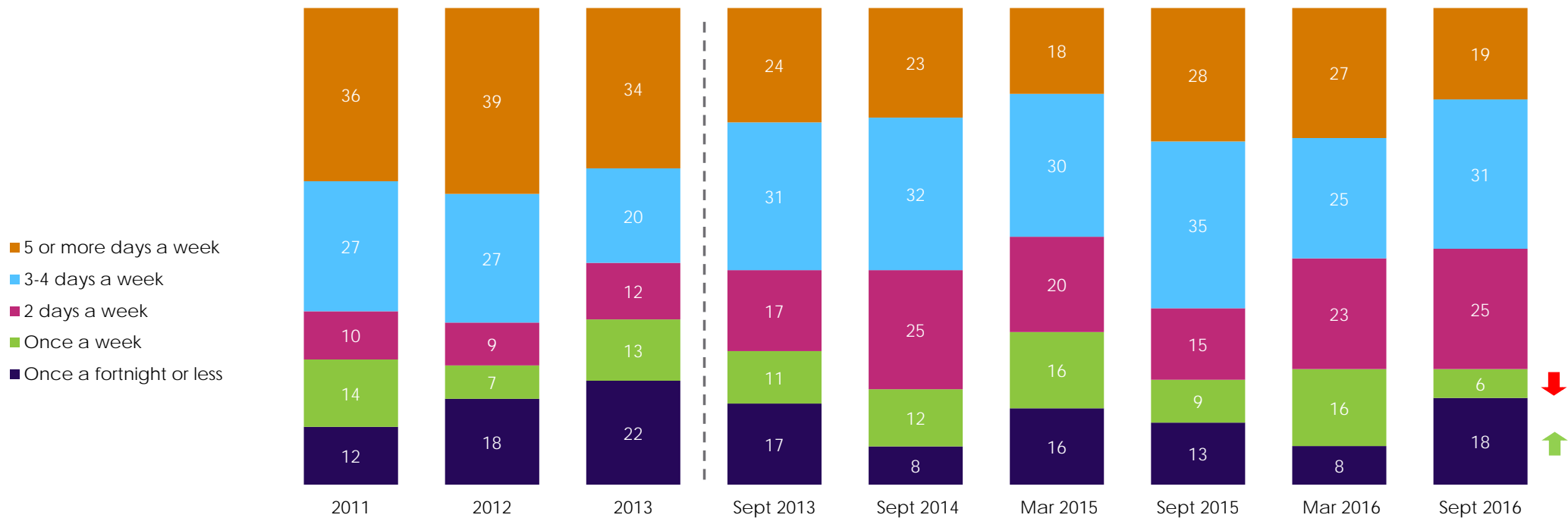
Mentions above 10% in Sept 2016 shown



Significantly up or down vs. March 2016

F2: What stops you from cycling to / from your workplace or place of education?  
 Base: All cyclists who only cycle for sport, leisure or exercise Sept 2016 (47), Mar 2016 (50)

# Frequency of commuting by bike

%



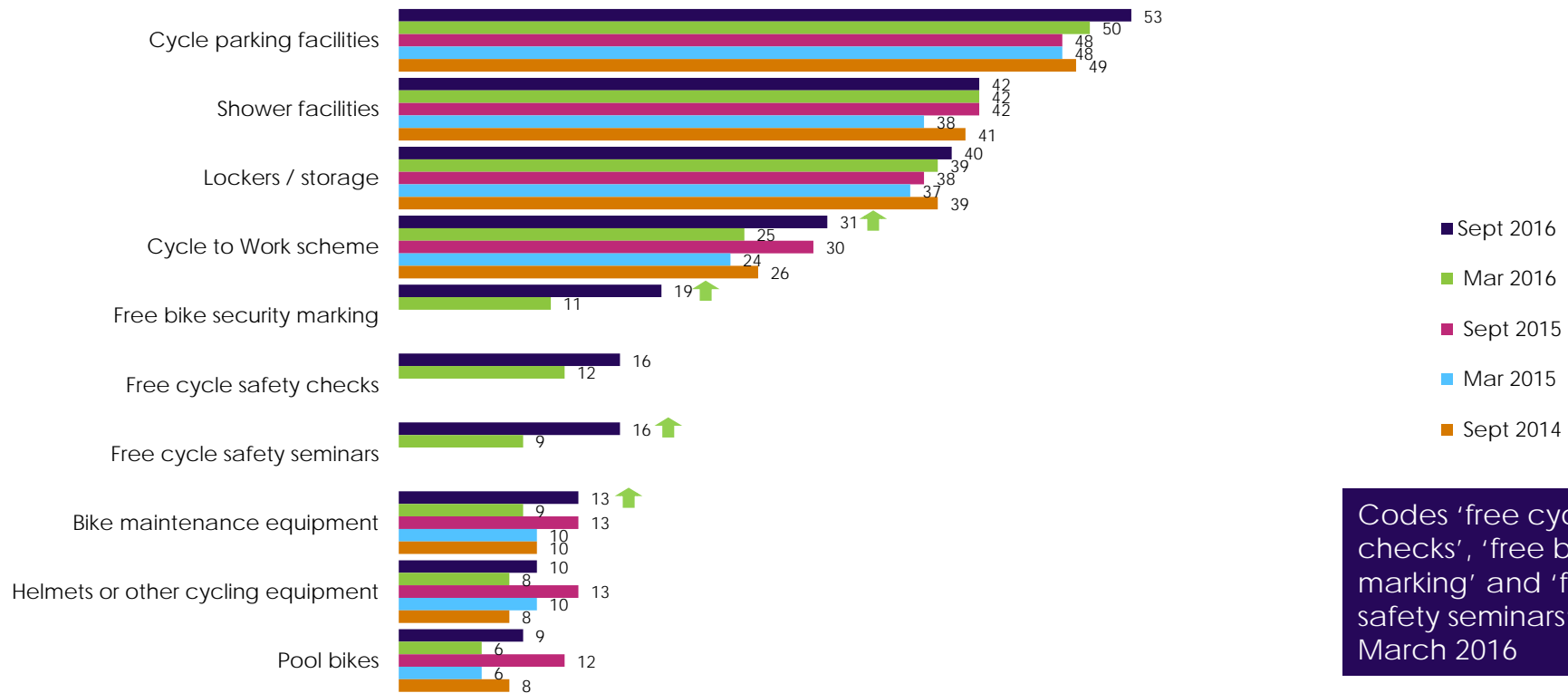


 Significantly up or down vs. March 2016

G3: Typically, how often do you cycle as a means of commuting in London?

Base: Those commuting by bike Sept 2016 (123), Mar 2016 (143), Sept 2015 (117), Mar 2015 (178), Sept 2014 (137), Sept 2013 (271), 2013 (234), 2012 (165), 2011 (58)



# Cycling facilities at work



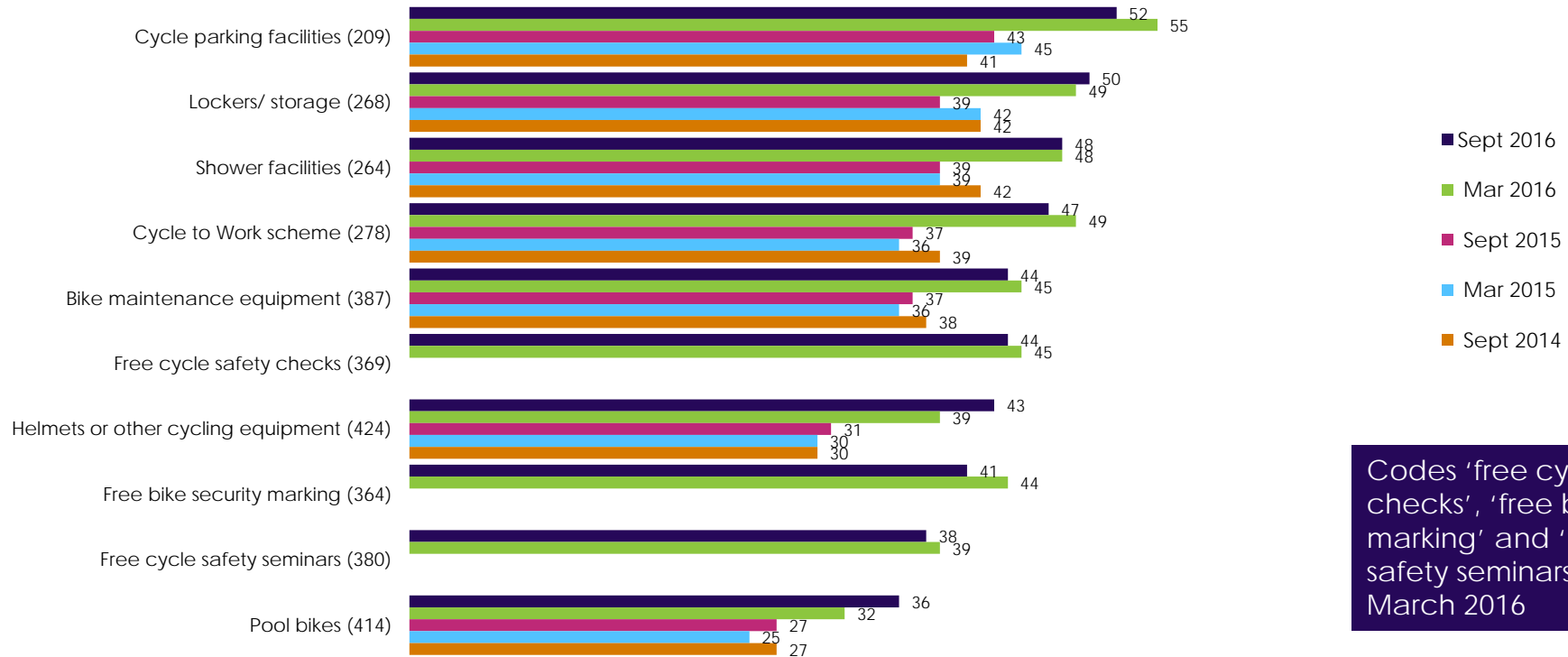
Codes 'free cycle safety checks', 'free bike security marking' and 'free cycle safety seminars' added in March 2016

↑↓ Significantly up or down vs. March 2016

G5: Does your employer/ place of education provide any of the following...?

Base: Those who work or are in education or who commute in London – Sept 2016 (547), Mar 2016 (565), Sept 2015 (885), Mar 2015 (1004), Sept 2014 (919)

# Cycling facilities that would encourage cycling



Codes 'free cycle safety checks', 'free bike security marking' and 'free cycle safety seminars' added in March 2016

Significantly up or down vs. March 2016

G6: Would it encourage you to cycle to work more if your employer/ place of education offered more facilities for cyclists?

Base: All respondents who work or are in education or who commute in London and are not provided with facilities Sept 2016 (Base sizes shown in chart for Sept 2016)



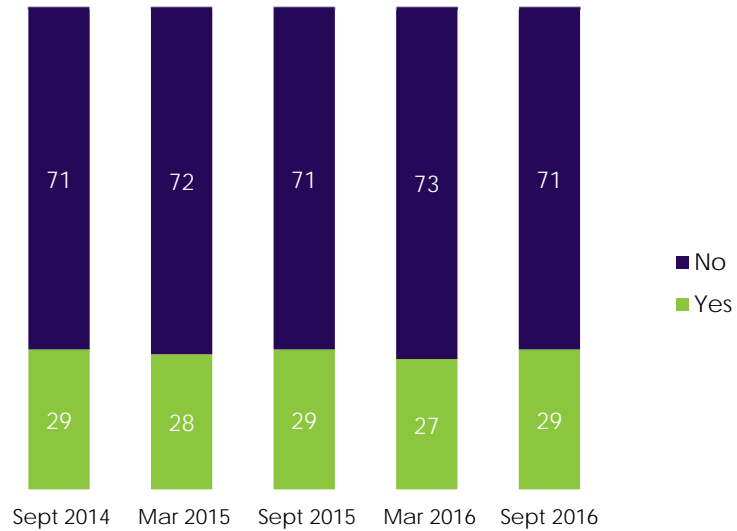
The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized arrow or a chevron pointing to the right. The text "Children's cycling" is written in white, sans-serif font, centered horizontally within the green area.

# Children's cycling

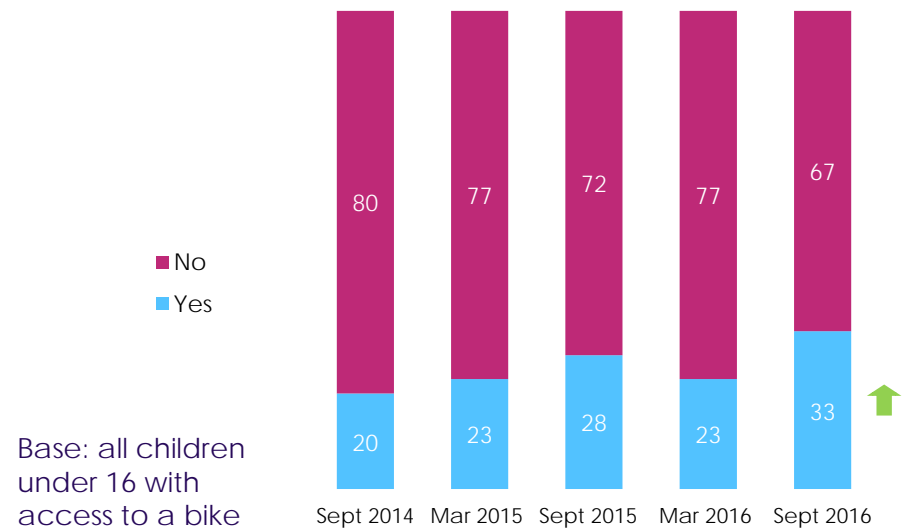
# Whether children in the household cycle to school



**Whether children under 16 in the household – %**



**Whether child cycles to school regularly – %**



Base: all children under 16 with access to a bike

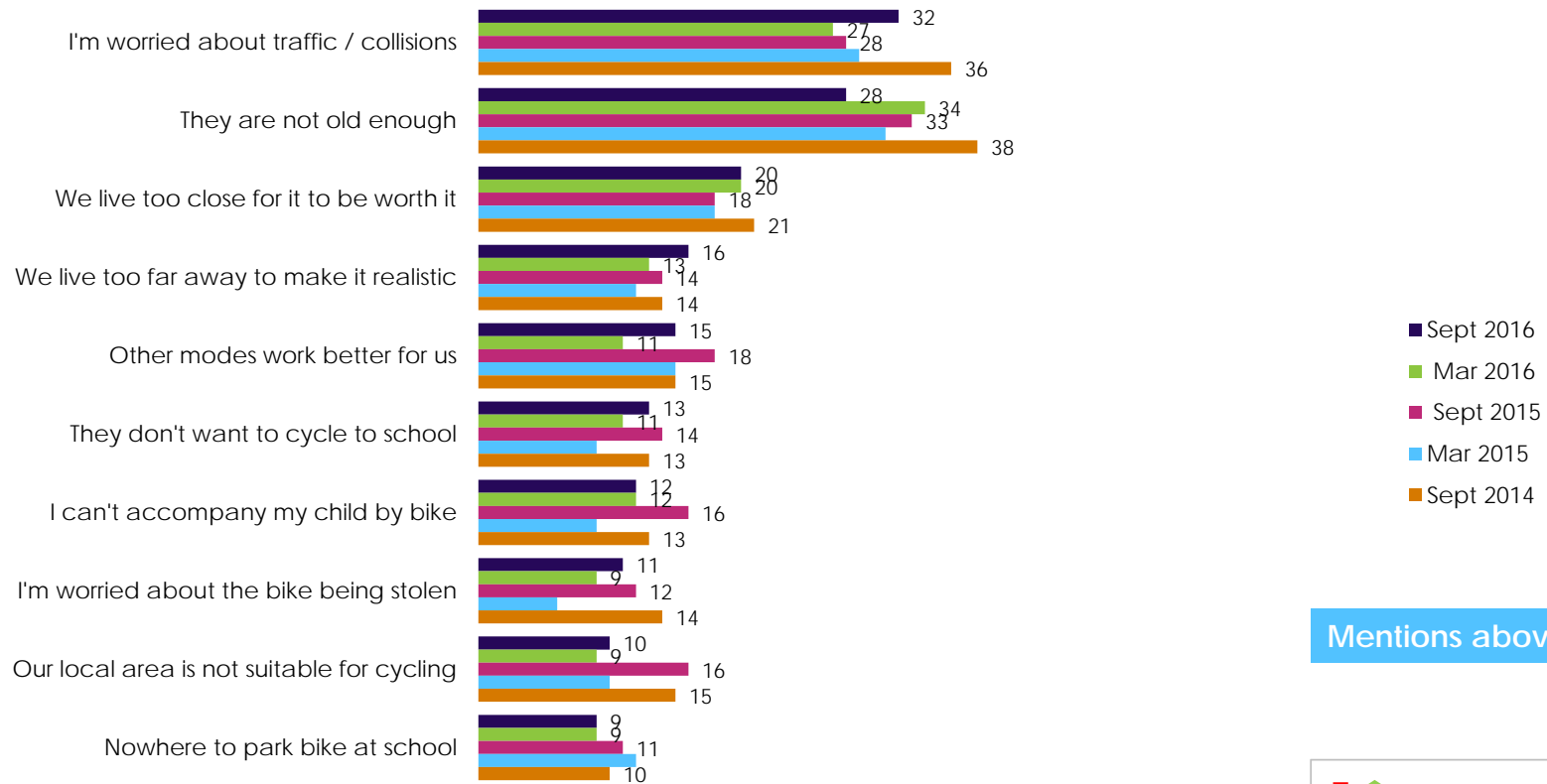
Significantly up or down vs. March 2016

G7: Do any children under the age of 16 live in your household? Base: All – Sept 2016 (1359), Mar 2016 (1388), Sept 2015 (1165), Mar 2015 (1213), Sept 2014 (1180)

G10: Whether cycle to school at least once a week Base: All children of respondents, with access to a bike – Sept 2016 (392), Mar 2016 (369), Sept 2015 (220), Mar 2015 (271), Sept 2014 (213)



# Reasons why child does not regularly cycle to school



Mentions above 8% shown

Significantly up or down vs. March 2016

G11: Why doesn't your child/don't your children cycle to school?

Base: All whose children own a bike but do not cycle to school regularly Sept 2016 (316), Mar 2016 (313), Sept 2015 (259), Mar 2015 (272), Sept 2014 (294)



Behaviour change

## Behaviour change model – definitions

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The behaviour change model categorises cyclists and non-cyclists into broad behavioural groupings

Londoners are presented with a number of statements regarding the possibility of cycling more (such as “thinking about doing this”) and must choose the one which most applies to them

The behavioural groupings are based on responses to these statements, a full list of which is found on the next slide

The statements do not represent a linear progression, and Londoners may move between any of the groups over time



# Behaviour change model – definitions

	Grouping	Proportion of cyclists					Proportion of non-cyclists				
		Sept 2014	Mar 2015	Sept 2015	Mar 2016	Sept 2016	Sept 2014	Mar 2015	Sept 2015	Mar 2016	Sept 2016
You have never thought about it, but would be unlikely to start in the future	Anti-contemplation	-	-	-	-	-	35%	36%	36%	31%	35%
You have thought about it but don't intend starting in the future	Anti-contemplation	-	-	-	-	-	34%	32%	34%	33%	31%
You have never thought about it but could be open to it in the future	Pre-contemplation	7%	9%	12%	6%	6%	13%	14%	12%	15%	15%
You are thinking about starting soon	Contemplation	11%	9%	12%	10%	14%	10%	9%	8%	11%	9%
You have decided to start soon	Preparation	4%	7%	6%	5%	6%	3%	3%	3%	4%	4%
You have tried to start recently, but are finding it difficult so far	Change	6%	5%	4%	6%	4%	-	-	-	-	-
You have started recently and are finding it quite easy so far	Change	5%	4%	4%	8%	8%	-	-	-	-	-
You started a while ago and are still doing it occasionally	Sustained change	23%	25%	24%	24%	25%	-	-	-	-	-
You started a while ago and are still doing it regularly	Sustained change	37%	33%	32%	37%	34%	-	-	-	-	-
You had started doing this but couldn't stick to it	Lapsed	7%	7%	7%	4%	3%	6%	6%	7%	6%	6%

Significantly up or down vs. March 2016

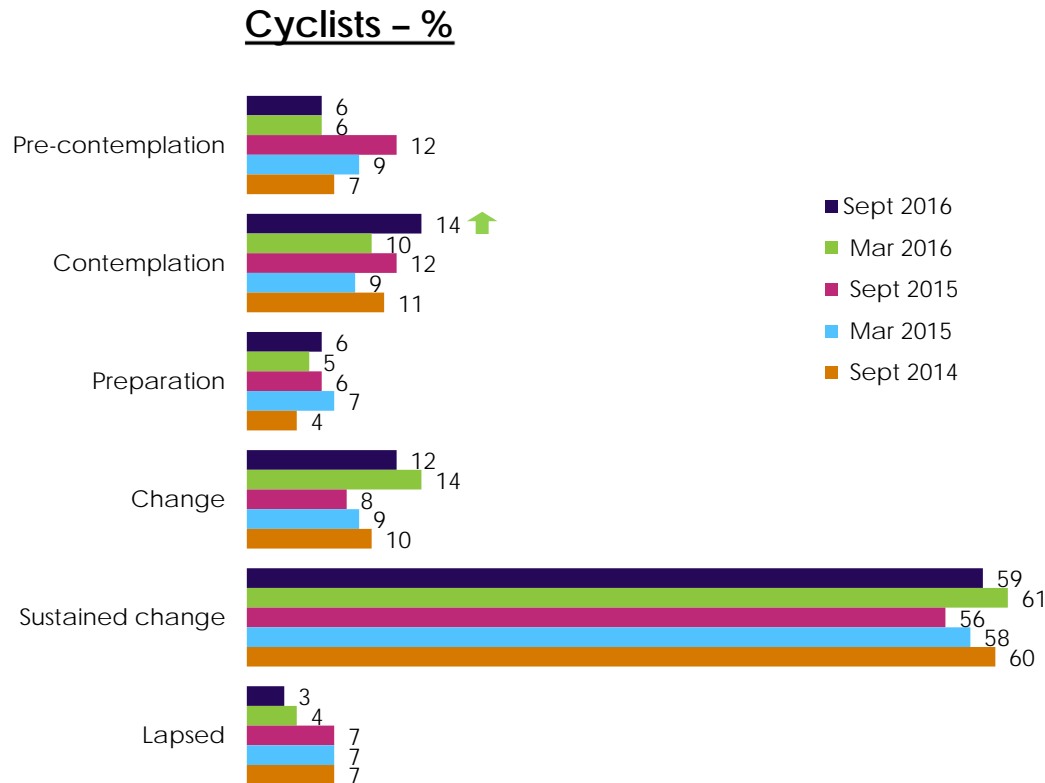
Significantly higher / lower vs. subgroup

B1: Which of the following would you say applies to you? When thinking about increasing the amount you cycle in London...

Base: all cyclists in the last 12 months September 2016 (507), March 2016 (511), Sept 2015 (505), March 2015 (506), Sept 2014 (531)/ all not cycled in the last 12 months September 2016 (1800), March 2016 (1821), Sept 2015 (1654), March 2015 (1735), Sept 2014 (1661).



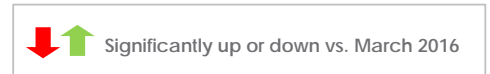
# Behaviour change model



59 per cent of those who have cycled in the last 12 months are in the 'sustained change' category, meaning they 'started cycling more a while ago and are still doing it either regularly or occasionally', in line with the previous wave

Twelve per cent are in a state of 'change', meaning they 'have tried to start cycling more recently, but are finding it difficult' or 'have started recently and are finding it quite easy so far'

One in seven (14 per cent) are categorised as 'contemplating' i.e. thinking about cycling more soon, significantly higher than last wave



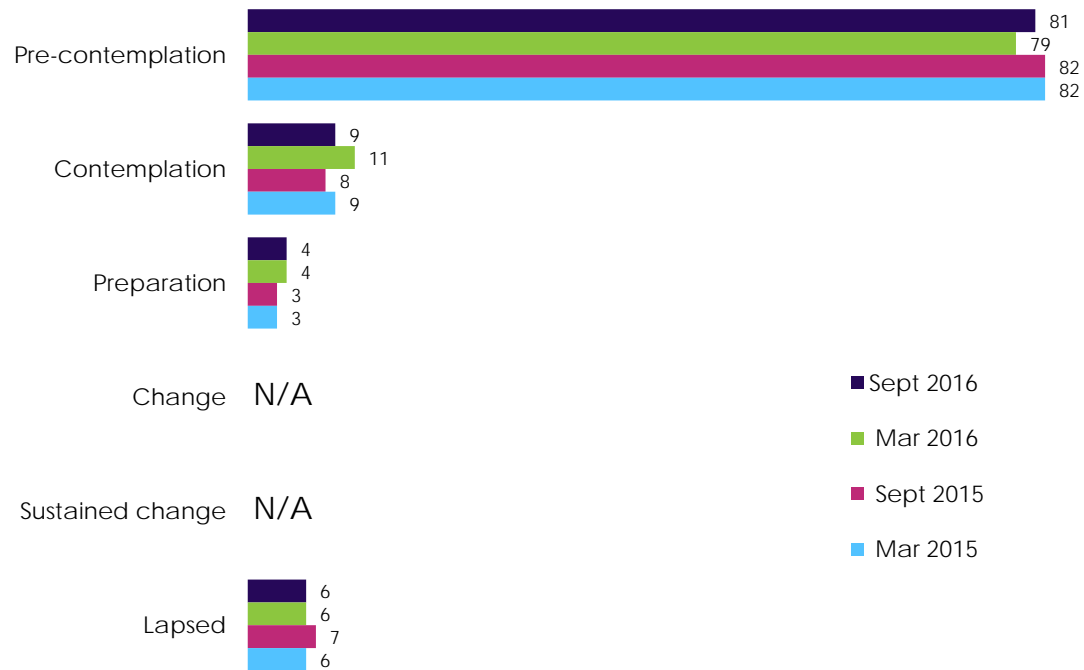
B1: Which of the following would you say applies to you? When thinking about increasing the amount you cycle in London...

Base: all cyclists in the last 12 months Sept 2016 (507), March 2016 (511), Sept 2015 (505), Mar 2015 (506), Sept 2014 (531), Sept 2013 (509)

# Behaviour change model



## Non-cyclists – %



Most of those who have not cycled in the last 12 months (81 per cent) are in the 'pre-contemplation' category, meaning they:

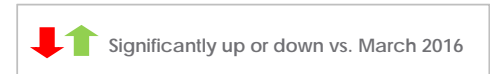
'Have never thought about taking up cycling, and are unlikely to start in the future'

'Have thought about it but don't intend starting in the future'; or

'Have never thought about it but could be open to it in the future'

Thirteen per cent of non cyclists are 'contemplating' or thinking about starting soon

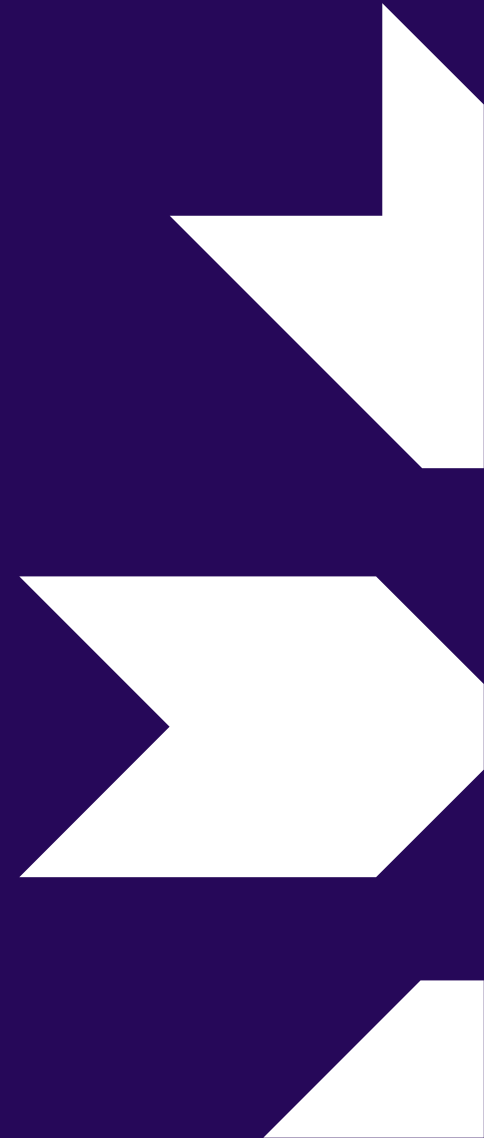
Six per cent are categorised as 'lapsed', meaning that they 'started cycling more, but couldn't stick to it'



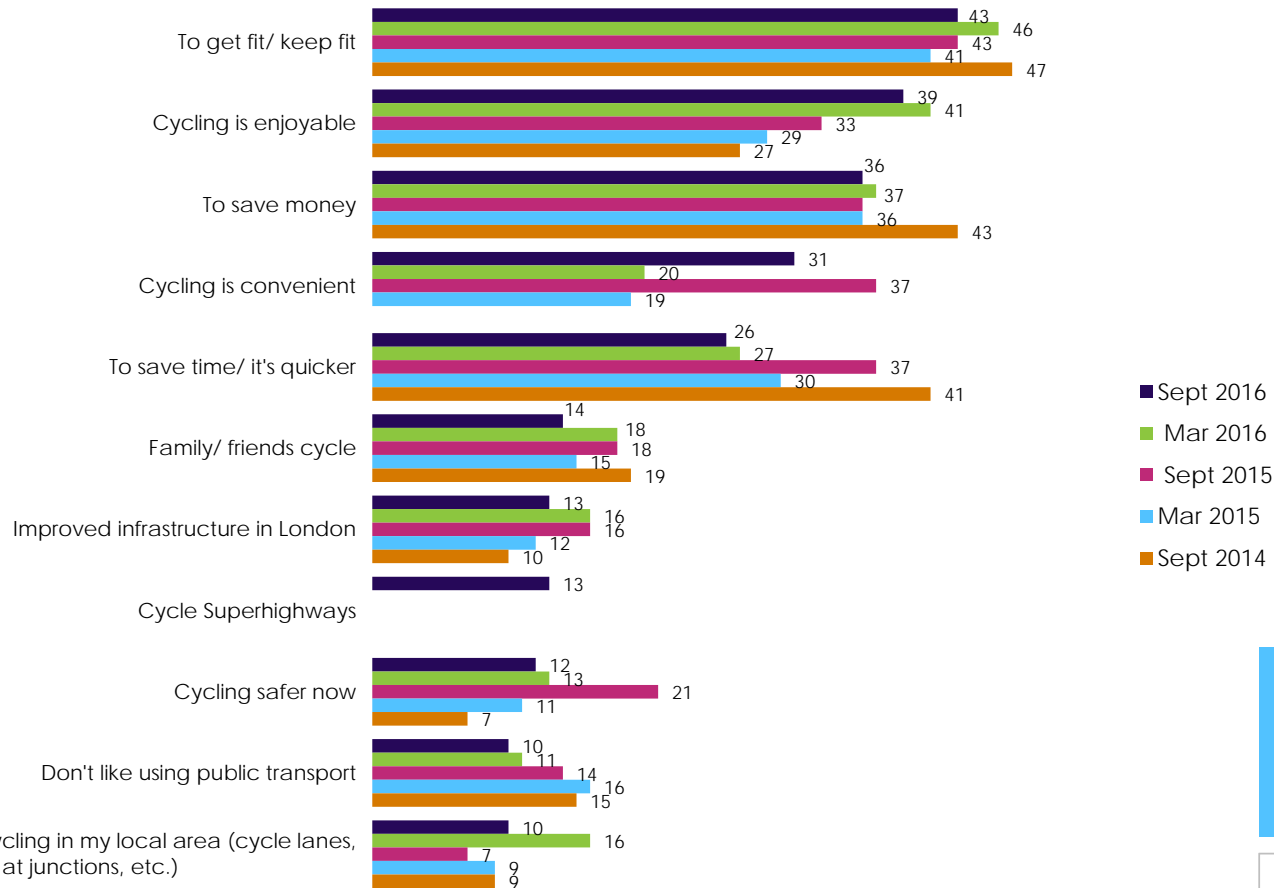
B1: Which of the following would you say applies to you? When thinking about increasing the amount you cycle in London...

Base: all not cycled in the last 12 months Sept 2016 (1800), March 2016 (1821), Sept 2015 (1654), Mar 2015 (1,735), Sept 2014 (1,661), Sept 2013 (824)

# Motivations and deterrents



# Motivations for considering cycling more



- Full trend data not available for some precodes which were introduced at a later date
- Mentions above 10% shown

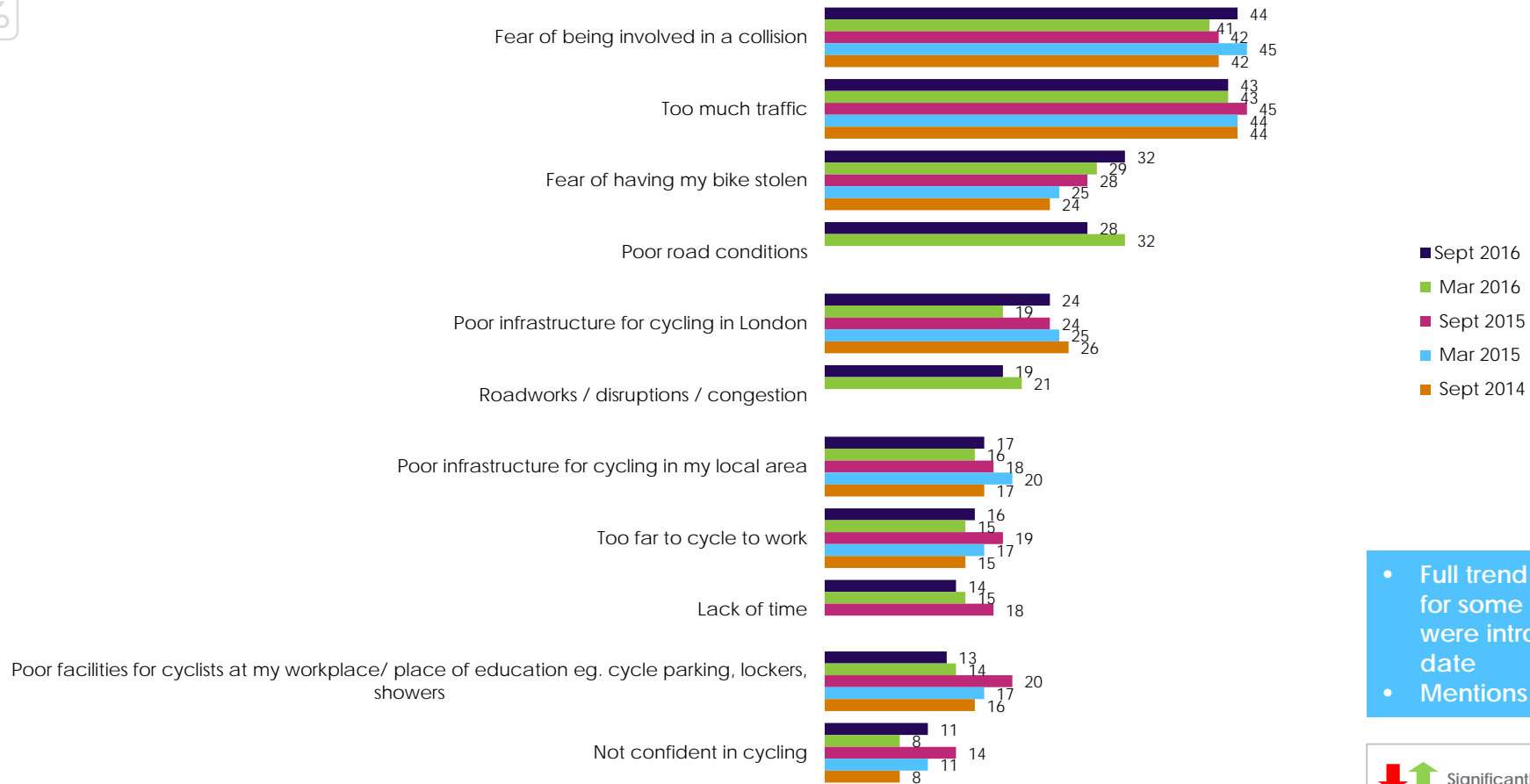
Significantly up or down vs. March 2016

E3: What is making you actively consider cycling more in London?

Base: All cyclists planning to cycle more Sept 2016 (114), Mar 2016 (95), Sept 2015 (132), Mar 2015 (124), Sept 2014 (105)



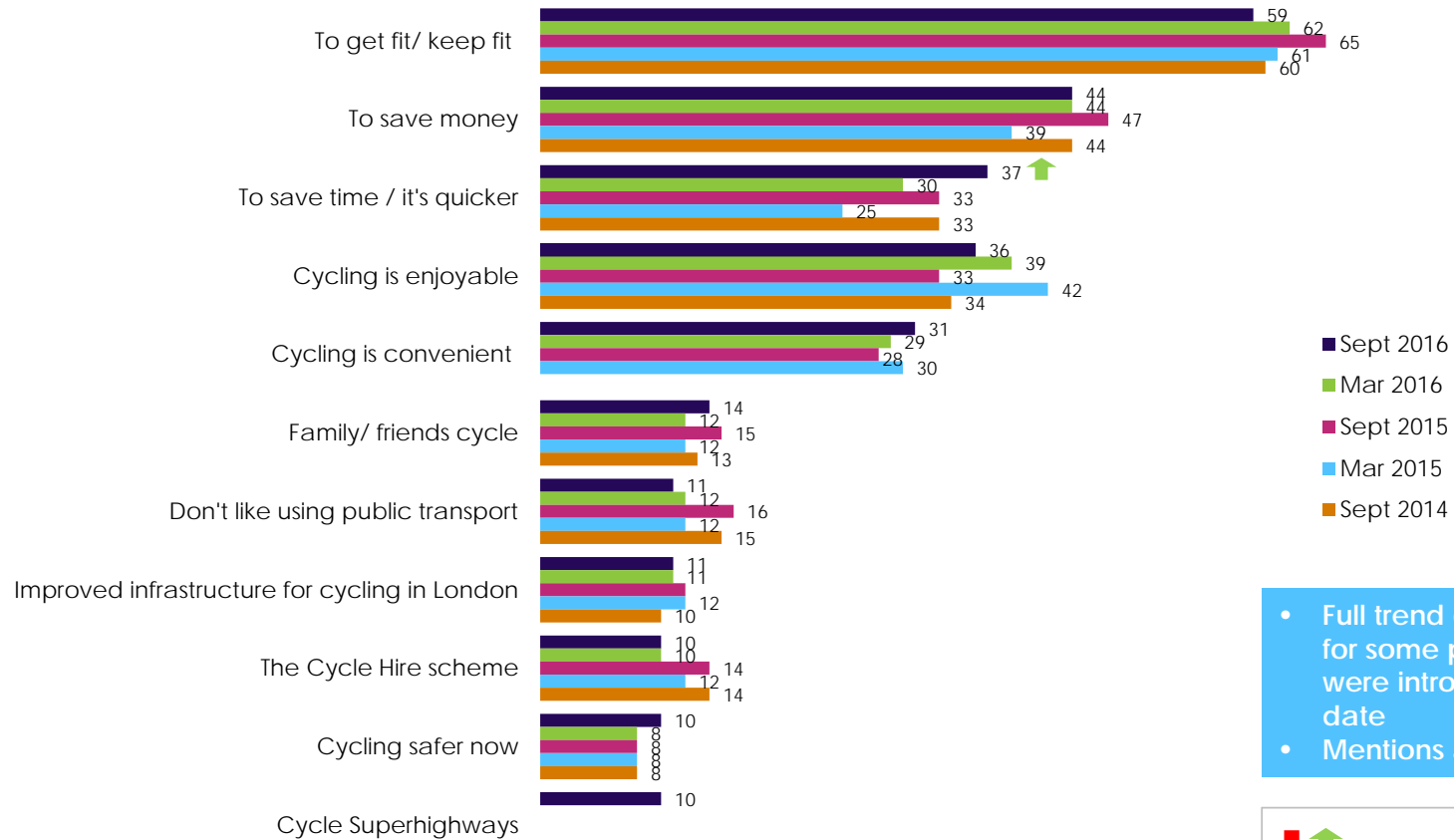
# Deterrents to cycling more



E7: What deters you from cycling more?

Base: All cyclists Sept 2016 (507), March 2016 (511), Sept 2015 (505) Mar 2015 (506), Sept 2014 (509)

# Motivations for considering taking up cycling



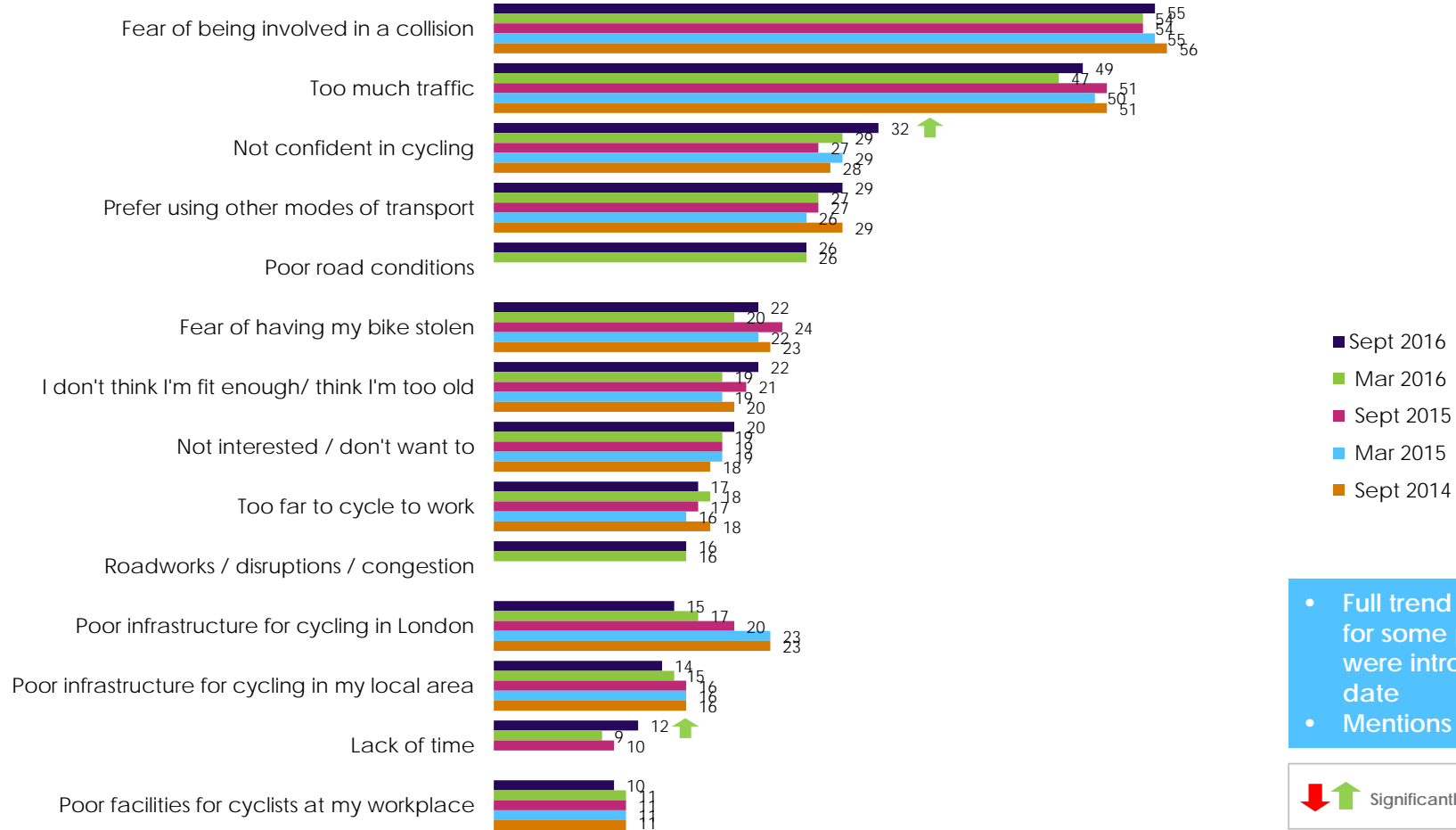
- Full trend data not available for some precodes which were introduced at a later date
- Mentions above 10% shown

Significantly up or down vs. March 2016

E3: What is making you actively consider taking up cycling in London?

Base: All non-cyclists intending to take up cycling Sept 2016 (487), Mar 2016 (502), Sept 2015 (358), Mar 2015 (426), Sept 2014 (385)

# Deterrents to taking up cycling



- Full trend data not available for some precodes which were introduced at a later date
- Mentions above 9% shown

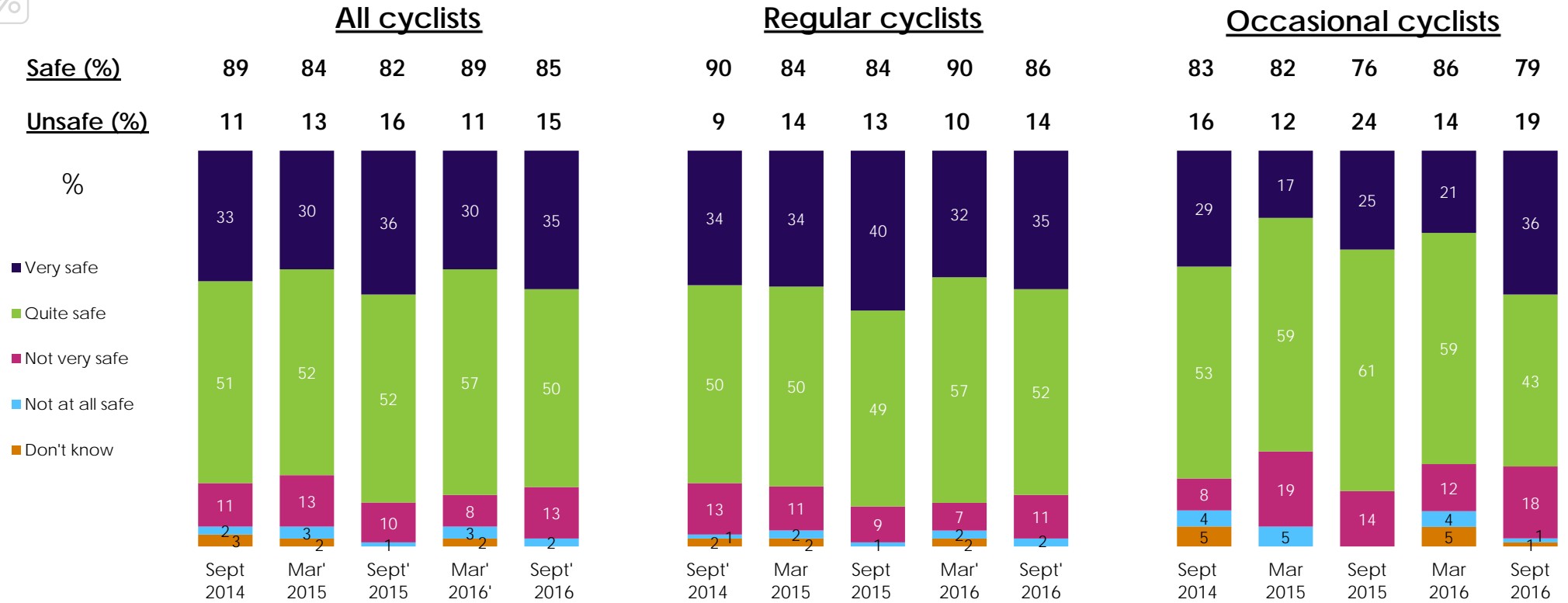
Significantly up or down vs. March 2016

E7: What deters you from taking up cycling?

Base: all non-cyclists Sept 2016 (1800), Mar 2016 (1821), Sept 2015 (1654), Mar 2015 (1735), Sept 2014 (1636)

# Feeling of safety cycling on quiet roads

%



↓
↑
 Significantly up or down vs. March 2016

K6: In respect of the traffic you encounter when cycling in London, how safe do you feel cycling in traffic on quiet roads?

Base: All cyclists Sept 2016: 295, Mar 2016: 306, Sept 2015: 267, Mar 2015: 284, Sept 2014: 271, Sept 2013: 509

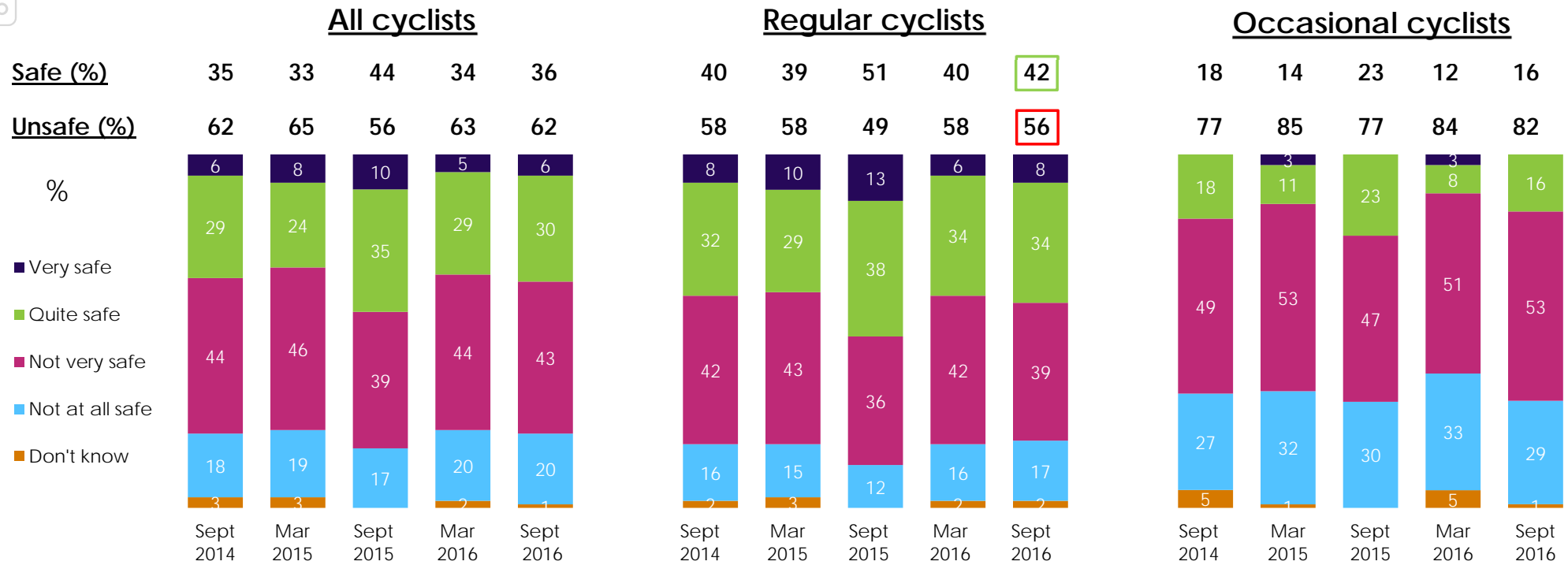
Regular cyclists Sept 2016: 228, Mar 2016: 245, Sept 2015: 199, Mar 2015: 209, Sept 2014: 200, Sept 2013: 387

Occasional cyclists Sept 2016: 67, Mar 2016: 61, Sept 2015: 68, Mar 2015: 75, Sept 2014: 71, Sept 2013: 122



# Feeling of safety cycling on busy roads

%



Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

K7. In respect of the traffic you encounter when cycling in London, how safe do you feel cycling in traffic...? - On busy roads

Base: All cyclists Sept 2016: 295, Mar 2016: 306, Sept 2015: 267, Mar 2015: 284, Sept 2014: 271, Sept 2013: 509

Regular cyclists Sept 2016: 228, Mar 2016: 245, Sept 2015: 199, Mar 2015: 209, Sept 2014: 200, Sept 2013: 387

Occasional cyclists Sept 2016: 67, Mar 2016: 61, Sept 2015: 68, Mar 2015: 75, Sept 2014: 71, Sept 2013: 122



The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized arrow or a corner cutout, pointing towards the center. The text "Attitudes to cycling" is written in white, sans-serif font, centered horizontally within the green area.

# Attitudes to cycling

# Emotional factors – % agree

%





 Significantly up or down vs. March 2016

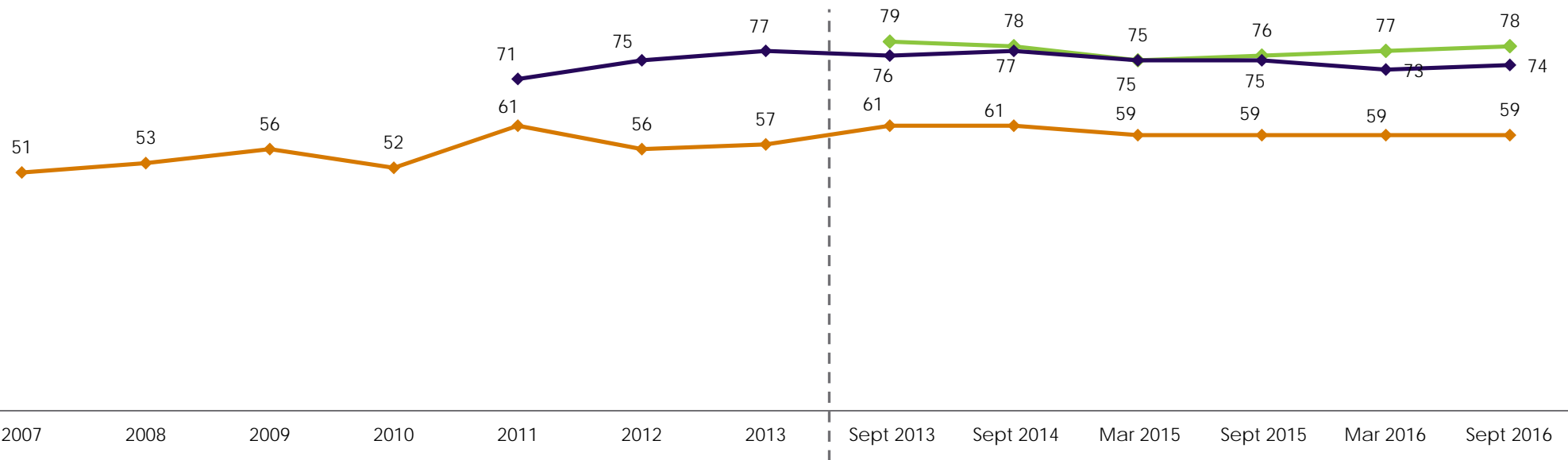
A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London



Base: All – Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

# Social factors – % agree



- ◆ Cycling makes a positive contribution to the quality of life in London (first asked 2013)
- ◆ Cycling is a good social activity (first asked 2010)
- ◆ Cycling is a method of transport that you would want to be seen using





 Significantly up or down vs. March 2016

A1: For each [statement], I'd like you to tell me whether or not you believe it is true of cycling in London

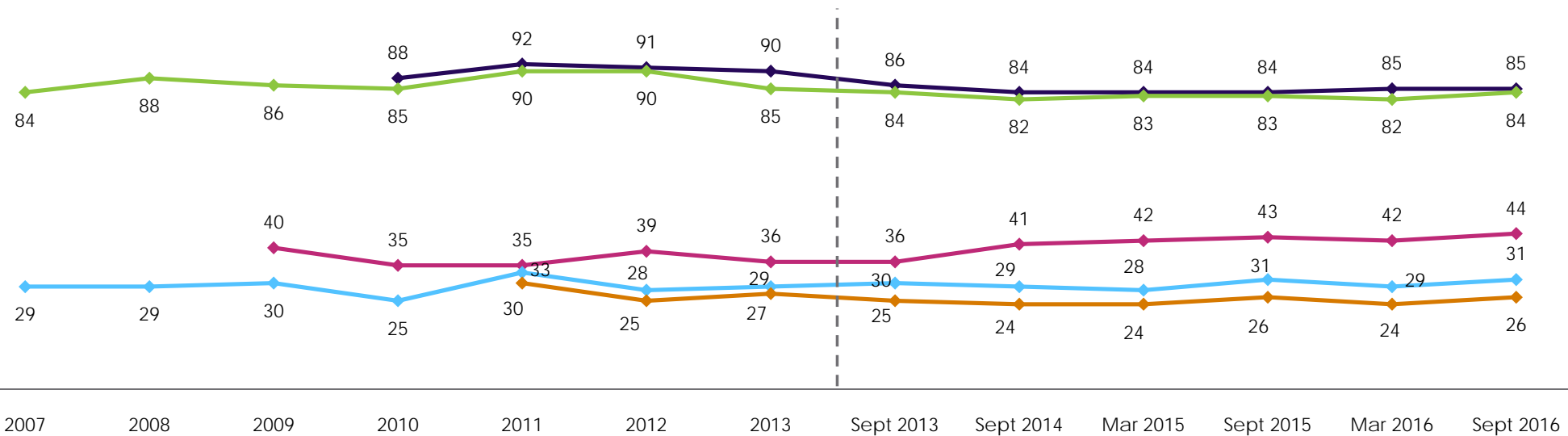
Base: All – Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)



# Confidence factors – % agree



- ◆ Cyclists are vulnerable to other road users (first asked March 2010)
- ◆ Traffic makes people afraid of cycling on London streets
- ◆ Cycling is not for people like me (first asked 2009)
- ◆ Cycling is a safe way of getting about
- ◆ I feel confident cycling on London's roads (first asked Jun10; first reported 2011)



Significantly up or down vs. March 2016

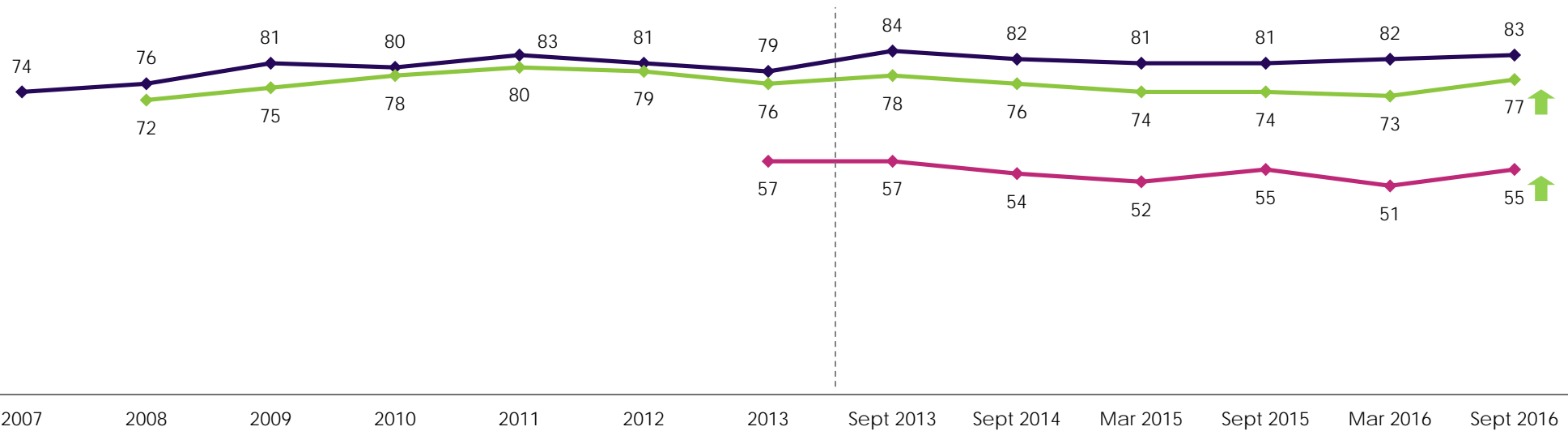
A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

# Convenience factors – % agree

%

- ◆ Cycling is a convenient way of getting around
- ◆ Cycling is the fastest way to travel for short journeys
- ◆ I can accurately estimate my journey time when travelling by bike (first asked 2013)



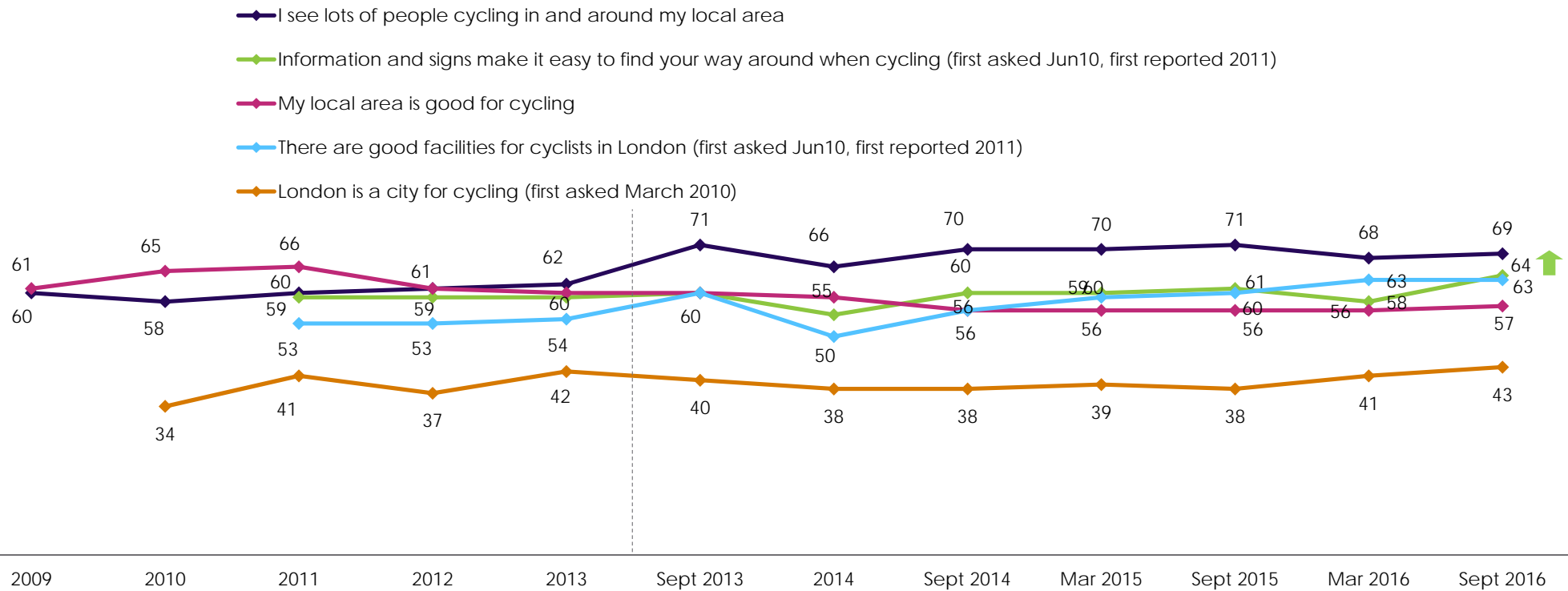
Significantly up or down vs. March 2016

A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)



# Facility factors – % agree

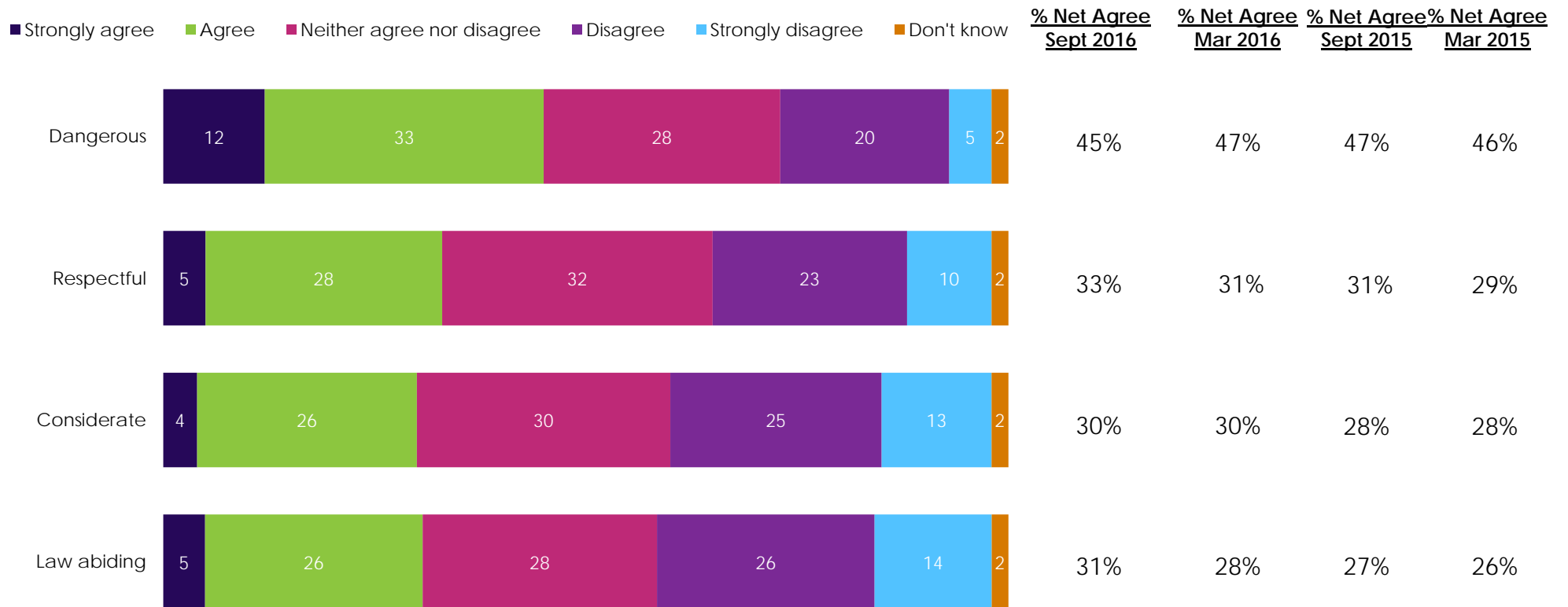


Significantly up or down vs. March 2016

A1: For each statement, I'd like you to tell me whether or not you believe it is true of cycling in London

Base: All – Sept 2016 (2315), Mar 2016 (2344), Sept 2015 (2159), Mar 2015 (2241), Sept 2014 (2192), Sept 2013 (1333), 2013 (1373), 2012 (1326), 2007-2011 (c.1000)

# Attitudes towards cyclists



↓ ↑ Significantly up or down vs. March 2016

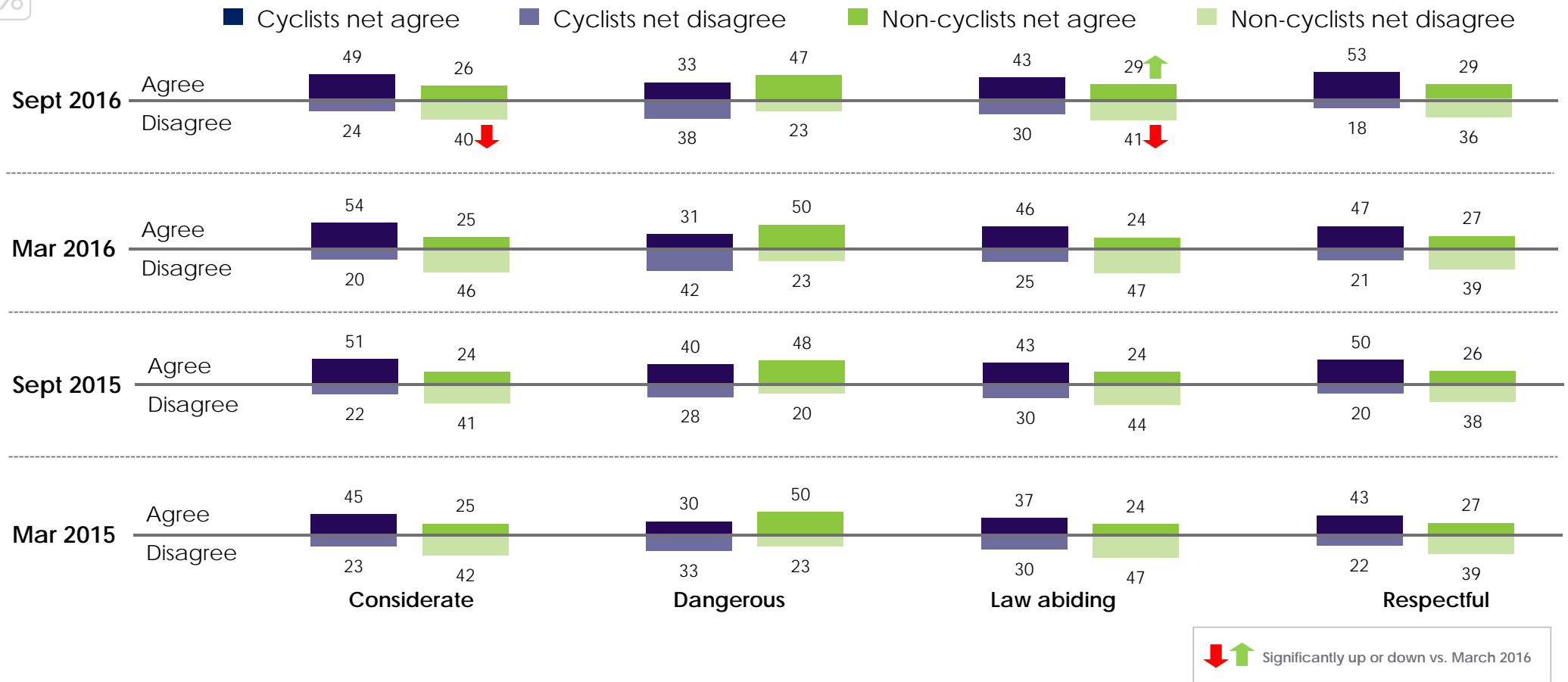
H1: Do you feel that cyclists in general are...?

Base: All – Sept 2016 (1359), March 2016 (1388), Sept 2015 (1165), March 2015 (1213), Sept 2014 (1180)



# Attitudes towards cyclists

%



H1: Do you feel that cyclists in general are ...? Base Sept 2016 all cyclists (295), all non-cyclists (1059); Mar 2016 all cyclists (306), all non-cyclists (1072); Sept 2015 all cyclists (267), all non-cyclists (898); Mar 2015 all cyclists (284), all non-cyclists (929)

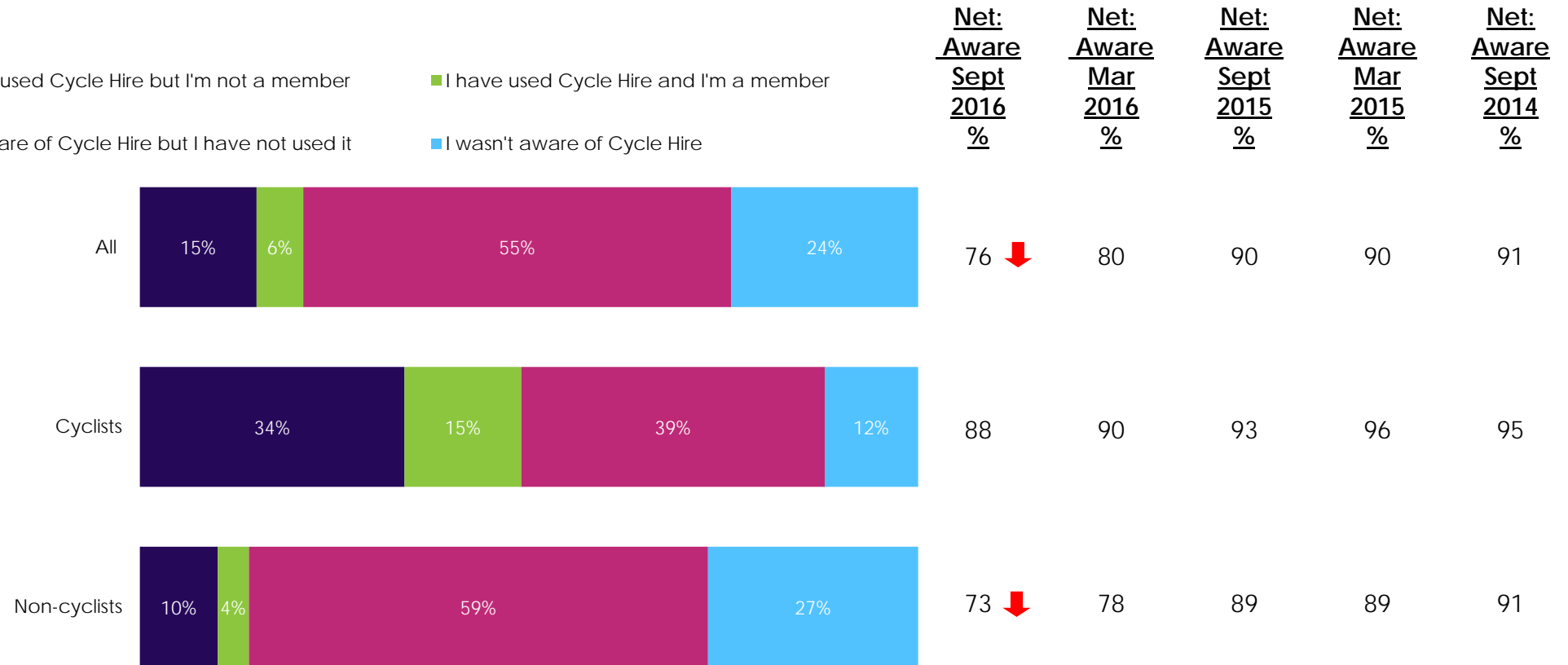


Cycle Hire

# Awareness of Cycle Hire



- I have used Cycle Hire but I'm not a member
- I have used Cycle Hire and I'm a member
- I'm aware of Cycle Hire but I have not used it
- I wasn't aware of Cycle Hire



Significantly up or down vs. March 2016

M10. For the following schemes, which of the following best applies to you? - Cycle Hire scheme

Base: All – Sept 2016 (1347), Mar 2016 (1379), Sept 2015: (1164), Mar 2015 (1,214), Sept 2014 (1,180); Cyclists: Sept 2016 (311), Mar 2016 (307), Sept 2015 (282), Mar 2015 (269), Sept 2014 (294); Non-cyclists – Sept 2016 (1031), Mar 2016 (1067), Sept 2015 (882), Mar 2015 (945), Sept 2014 (886)



# Use of Cycle Hire

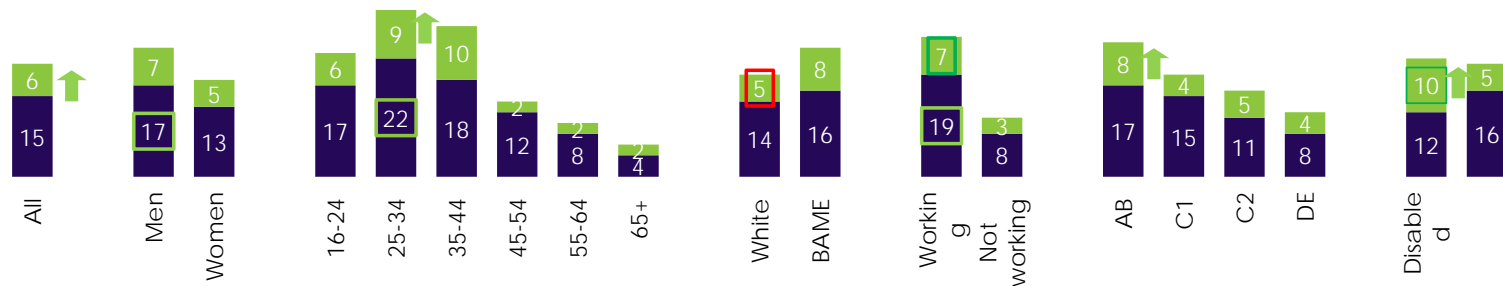


Sept 2016

■ I have used the Cycle Hire scheme but I'm not a member

■ I have used the Cycle Hire scheme and I am a member

%



Mar 2016

■ I have used the Cycle Hire scheme but I'm not a member

■ I have used the Cycle Hire scheme and I am a member

%



Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

M10. For the following schemes, which statement best applies to you? – The Cycle Hire scheme

Base: All – Sept 2016 (1347), Mar 2016 (1379)

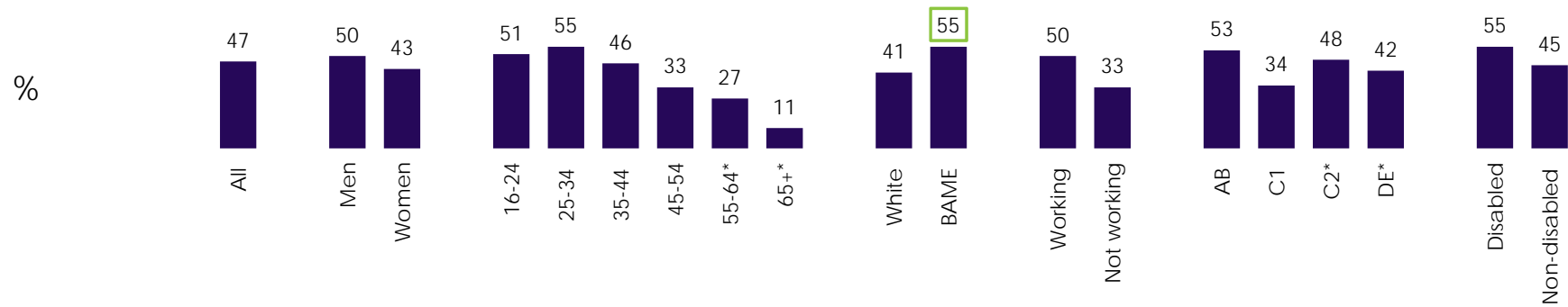


# Use of Cycle Hire in the last month



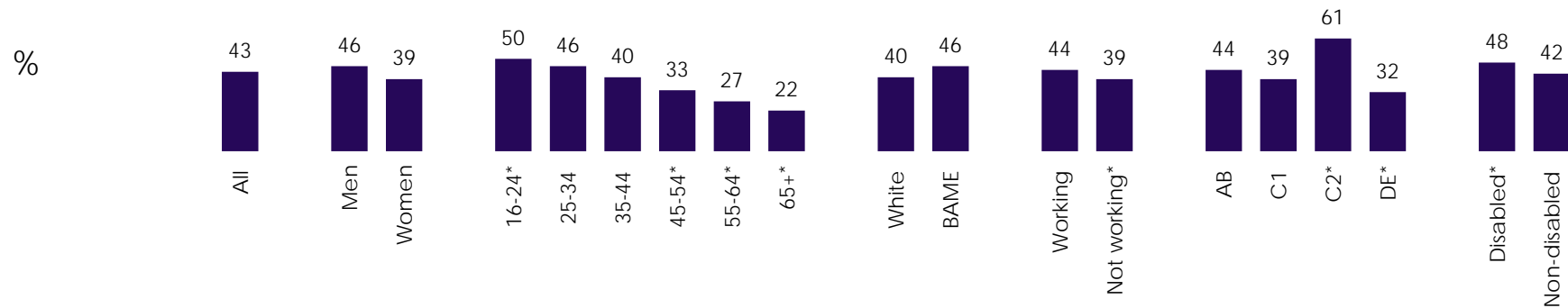
Sept 2016

■ I have used the Cycle Hire scheme in the last month



Mar 2016

■ I have used the Cycle Hire scheme in the last month



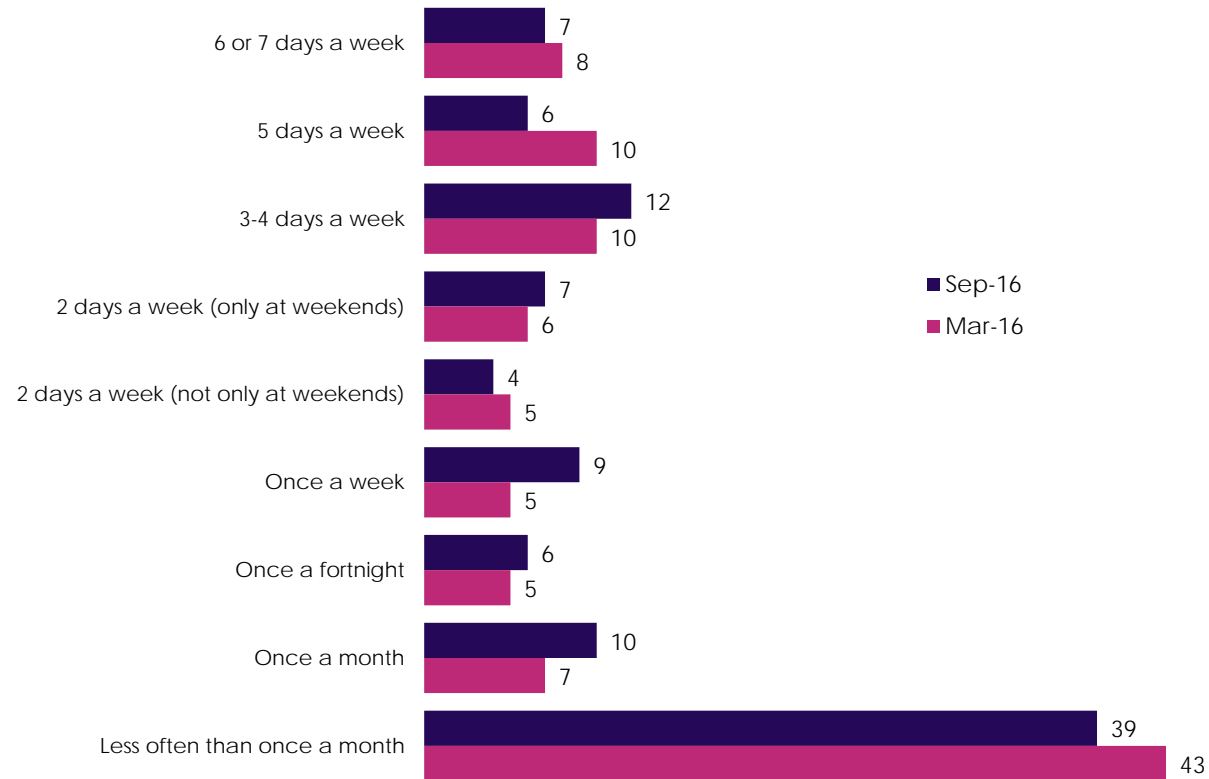
Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

M14. Have you used any of the following in the last month? – The Cycle Hire scheme

Base: All who have ever used the Cycle Hire scheme – Sept 2016 (287), Mar 2016 (266) \*caution – low base sizes

# Frequency of use of Cycle Hire



↓ ↑ Significantly up or down vs. March 2016

M13. How often do you currently use the Cycle Hire scheme?

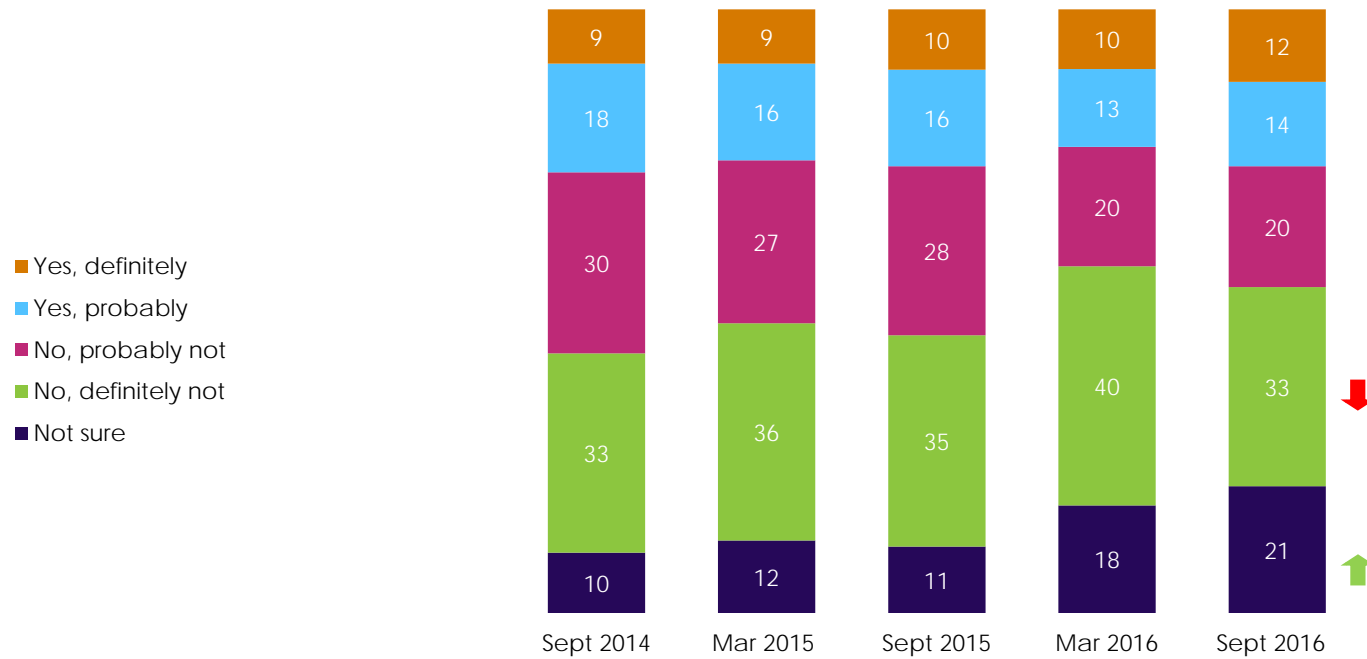
Base: All who have ever used the Cycle Hire scheme – Sept 2016 (287), Mar 2016 (266)





# Intention to use Cycle Hire in future

%

**Whether intend to use Cycle Hire in the future – %**

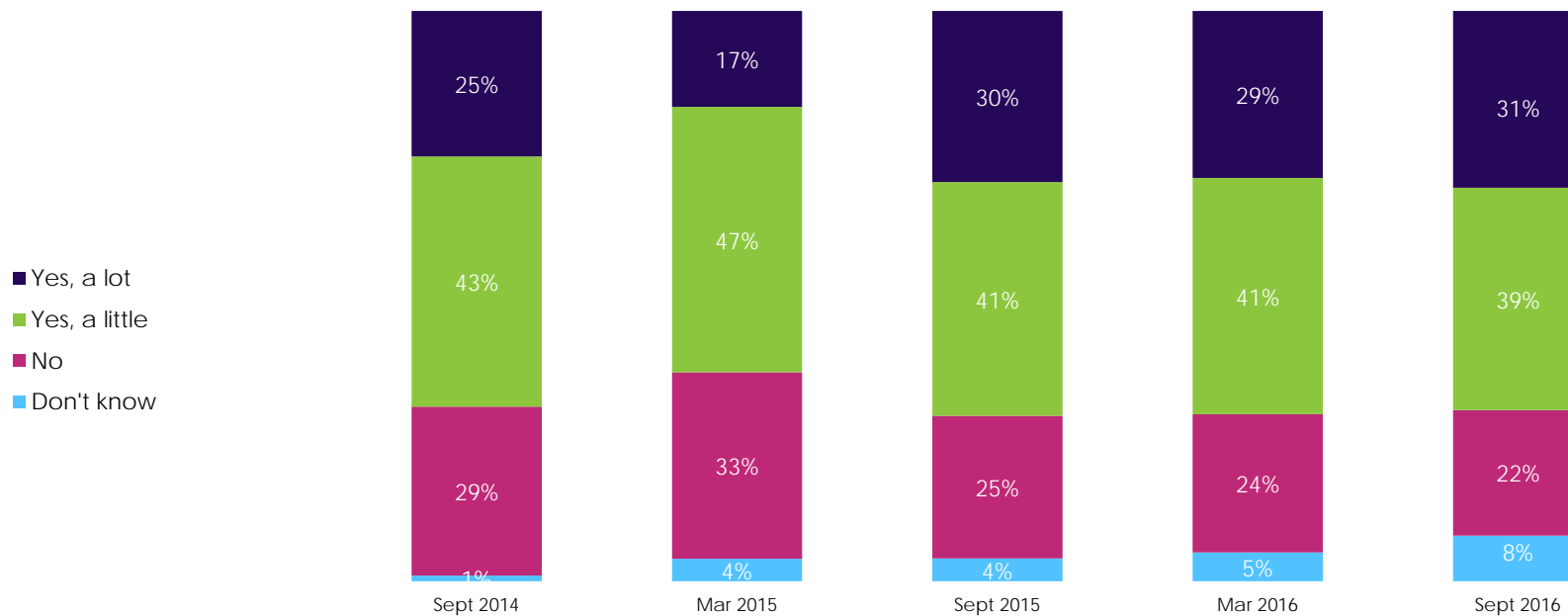




 Significantly up or down vs. March 2016

M11. In the next 12 months do you intend to use the cycle hire scheme...? Base: All respondents – Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), March 2015 (1214), Sept 2014 (1180)

# Impact of Cycle Hire on cycling among current users

%

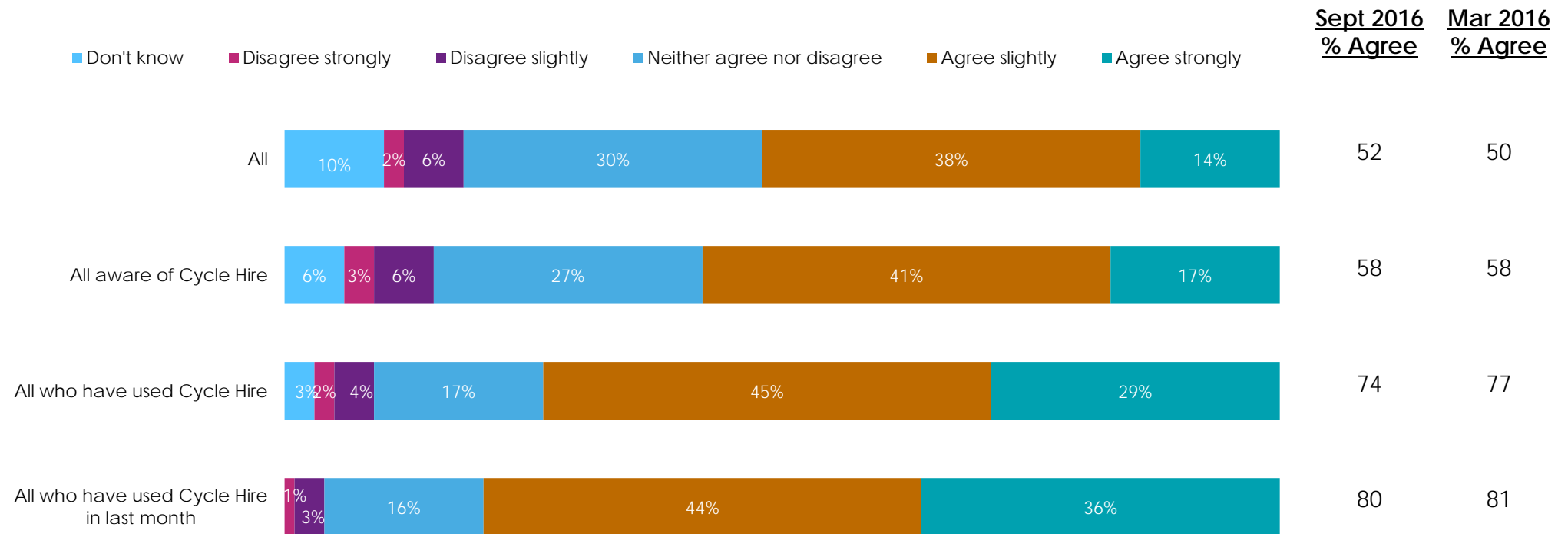


↓
↑
 Significantly up or down vs. March 2016

N5a. To what extent would you say the Cycle Hire scheme has encouraged you to increase the amount that you cycle?  
 Base: All current users – Sept 2016 (287), Mar 2016 (266), Sept 2015 (211), Mar 2015 (181), Sept 2014 (205), Sept 2013 (138)



# Ease of use of cycle hire scheme



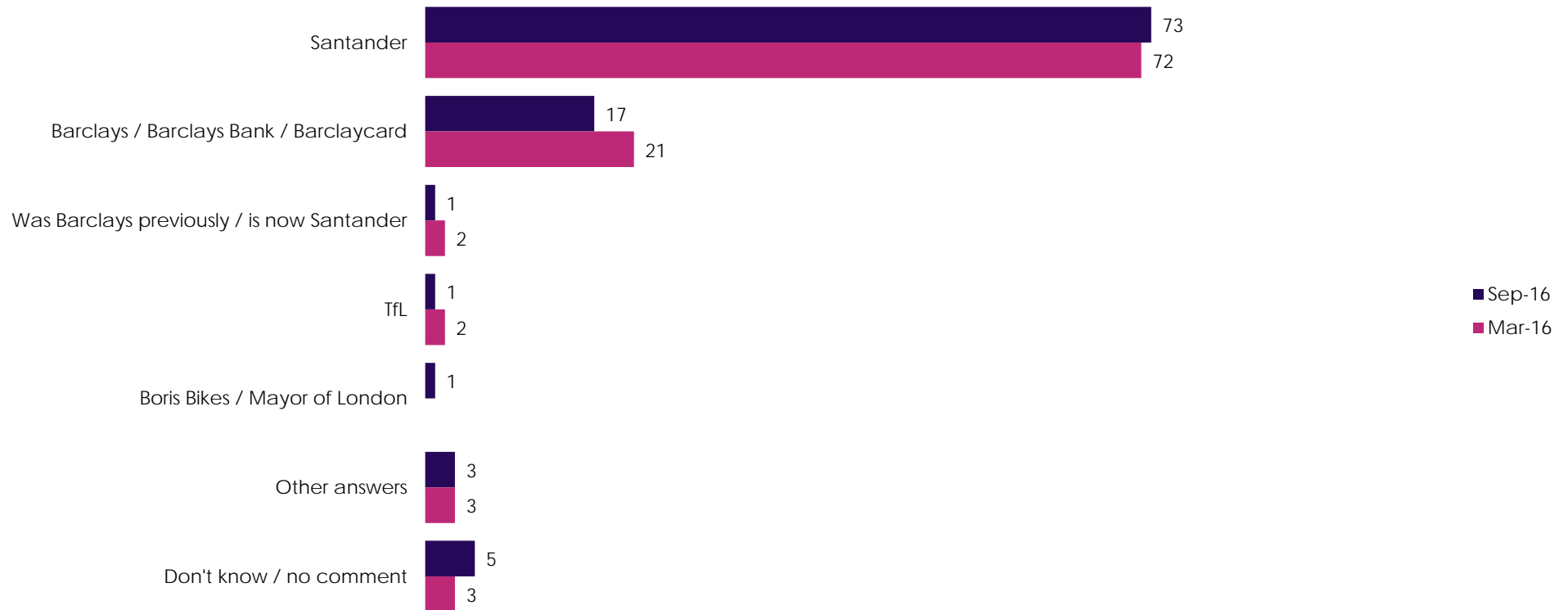
CT1. How much do you agree or disagree that the cycle hire scheme 'is easy to use'/'looks easy to use' ?

Base: Sept 2016 All (2315), All aware of Cycle Hire (1050), All who have used Cycle Hire (287), All who have used Cycle Hire in last month (128);

Mar 2016 All (2344), All aware of Cycle Hire (1135), All who have used Cycle Hire (266), All who have used Cycle Hire in last month (108)



# Awareness of Cycle Hire sponsorship

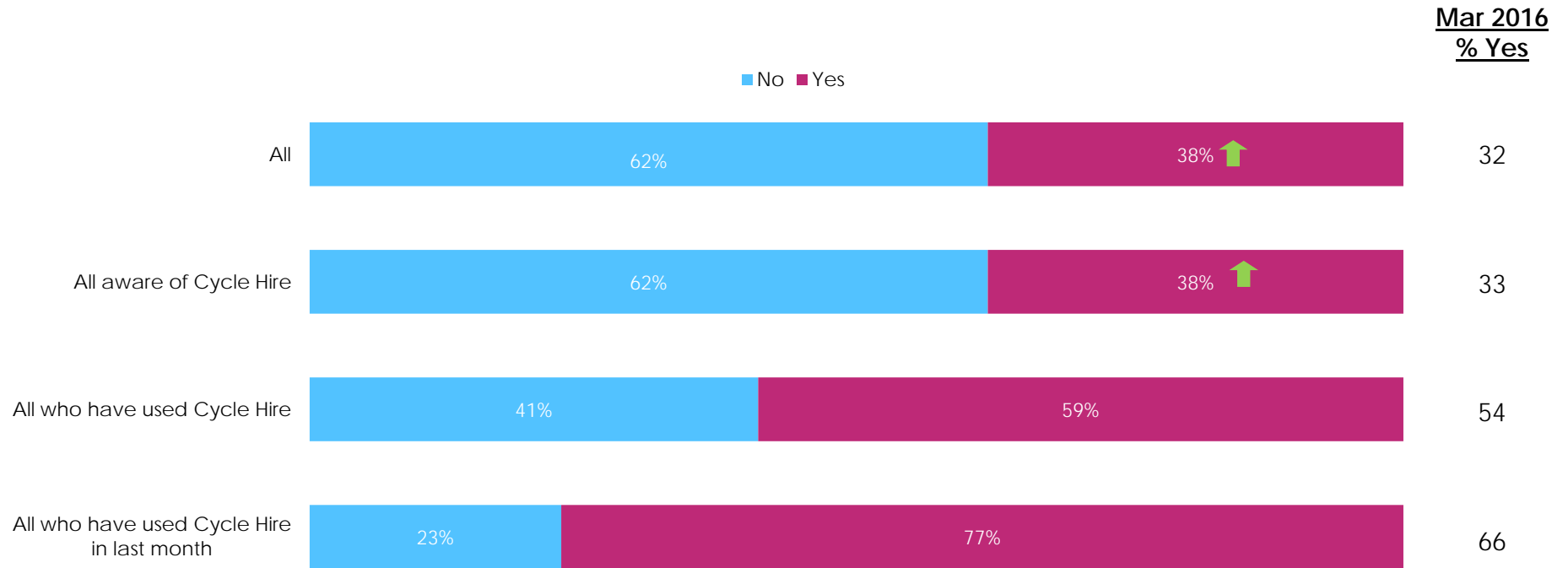


Significantly up or down vs. March 2016

CT2 Which company is the sponsor of the cycle hire scheme in London?  
 Base: All – Sept 2016 (1456), Mar 2016 (1616)



# Awareness of Cycle Hire app



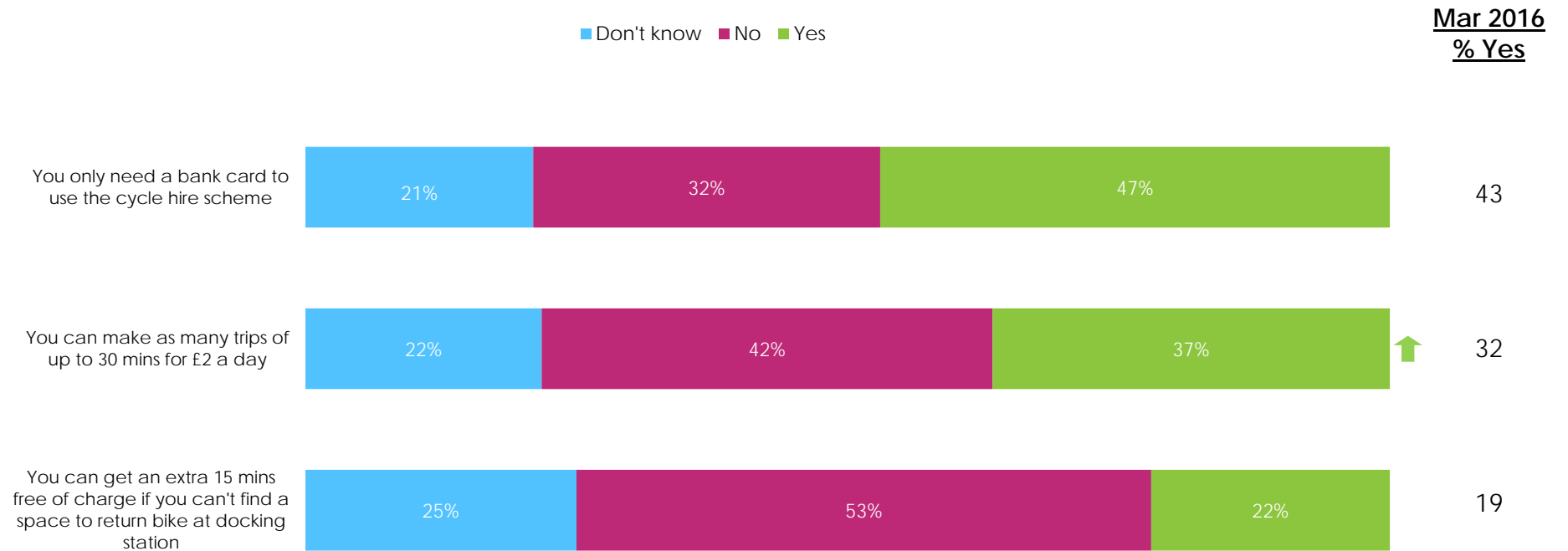
Significantly up or down vs. March 2016



CT3. Before today, had you heard of the free official Santander Cycles app that allows you to find and hire a bike?

Base: Sept 2016 All (2315), All aware of Cycle Hire (1050), All who have used Cycle Hire (287), All who have used Cycle Hire in last month (128)

Mar 2016 All (2344), All aware of Cycle Hire (1135), All who have used Cycle Hire (266), All who have used Cycle Hire in last month (108)

# Understanding of the Cycle Hire scheme



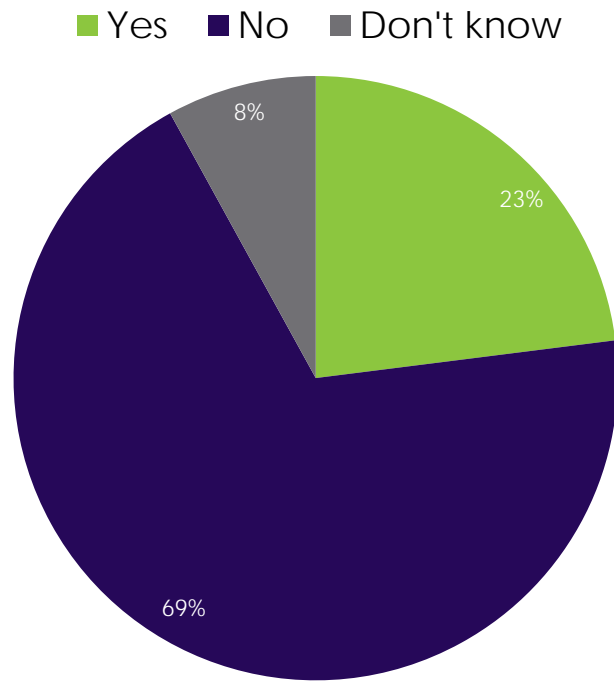


 Significantly up or down vs. March 2016

CT4. Now thinking about the Santander Cycles bike hire scheme (which has changed its name from Barclays Cycle Hire to Santander Cycles), were you aware that...?

Base: All aware of the Cycle Hire scheme Sept 2016 (1050), Mar 2016 (1135)



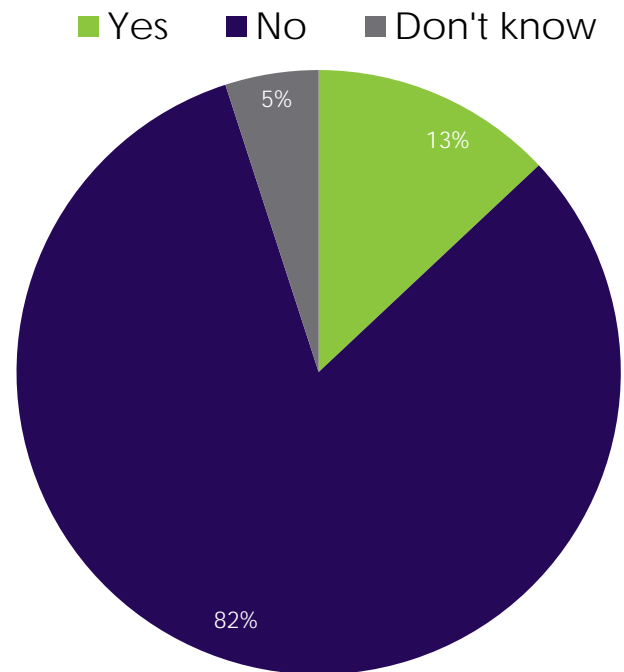
# Cycle Hire campaign recognition



Q16a. Have you seen any of these ads before?

Base: All Sept 2016 (2315)

# Cycle Hire campaign recognition

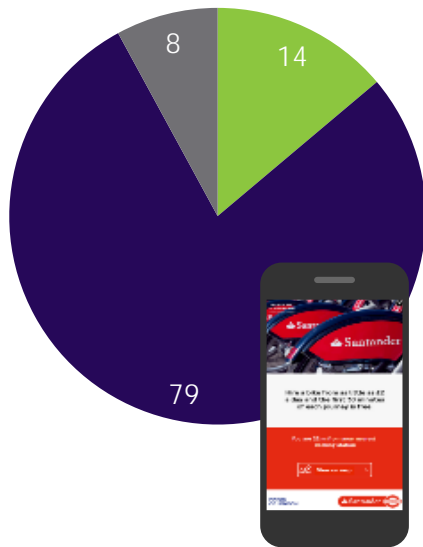


Q16b. Have you heard this radio ad before today?  
Base: All Sept 2016 (2315)

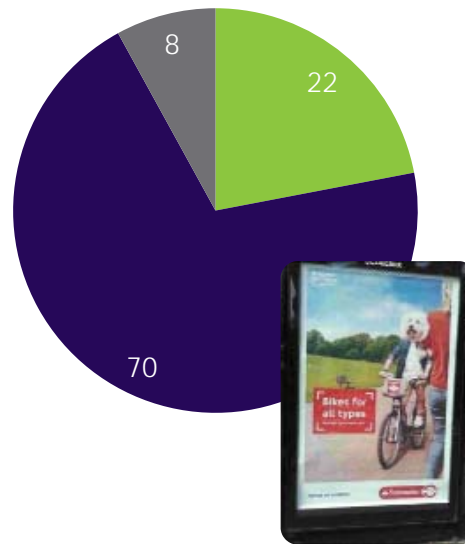
# Cycle Hire campaign recognition

%

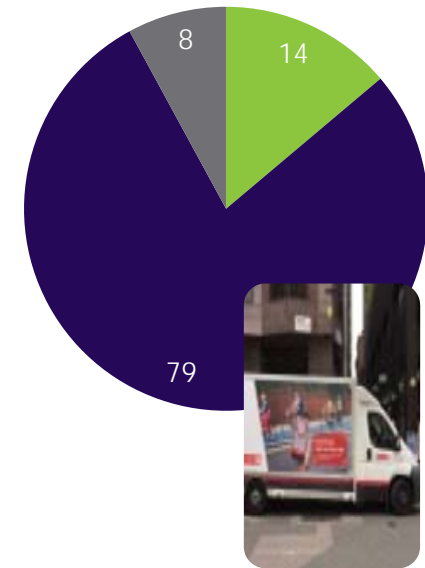
Mobile ads



Bus stop ad



Photos promoting the Santander Cycles app

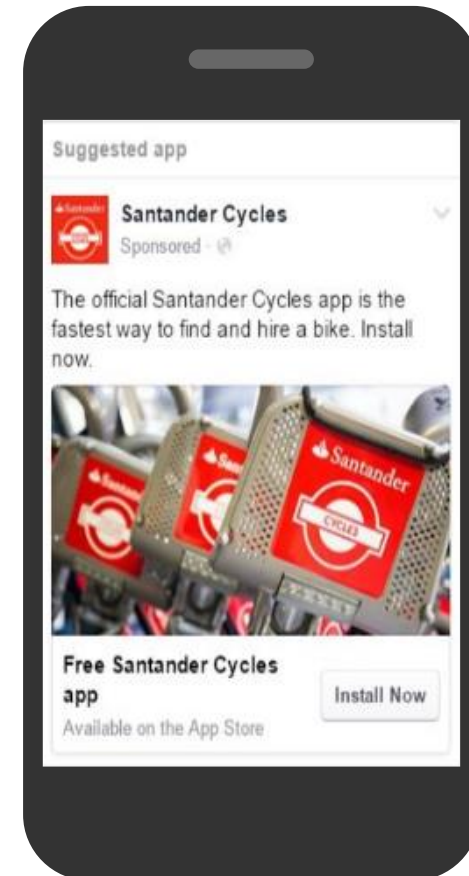
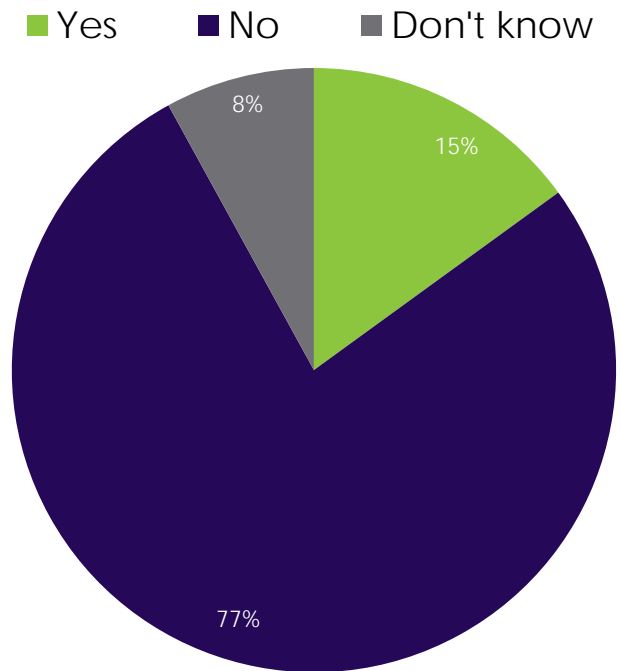


■ Yes  
■ No  
■ Don't know

Q16c. Have you seen any of these information leaflets, news articles or events for the Santander Cycles bike hire scheme before?

Base: All Sept 2016 (2315)

# Cycle Hire campaign recognition

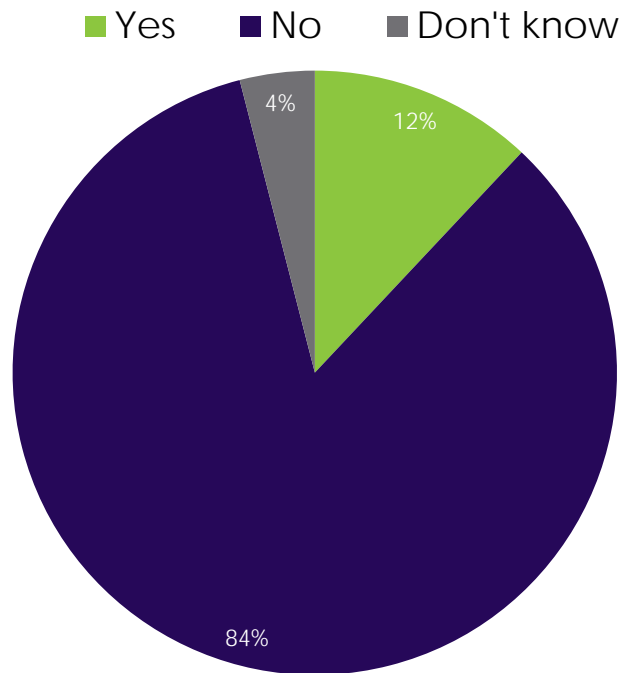


Q16d. Have you seen any posts about the Santander Cycles bike hire scheme on social media websites like the example shown below?

Base: All Sept 2016 (2315)



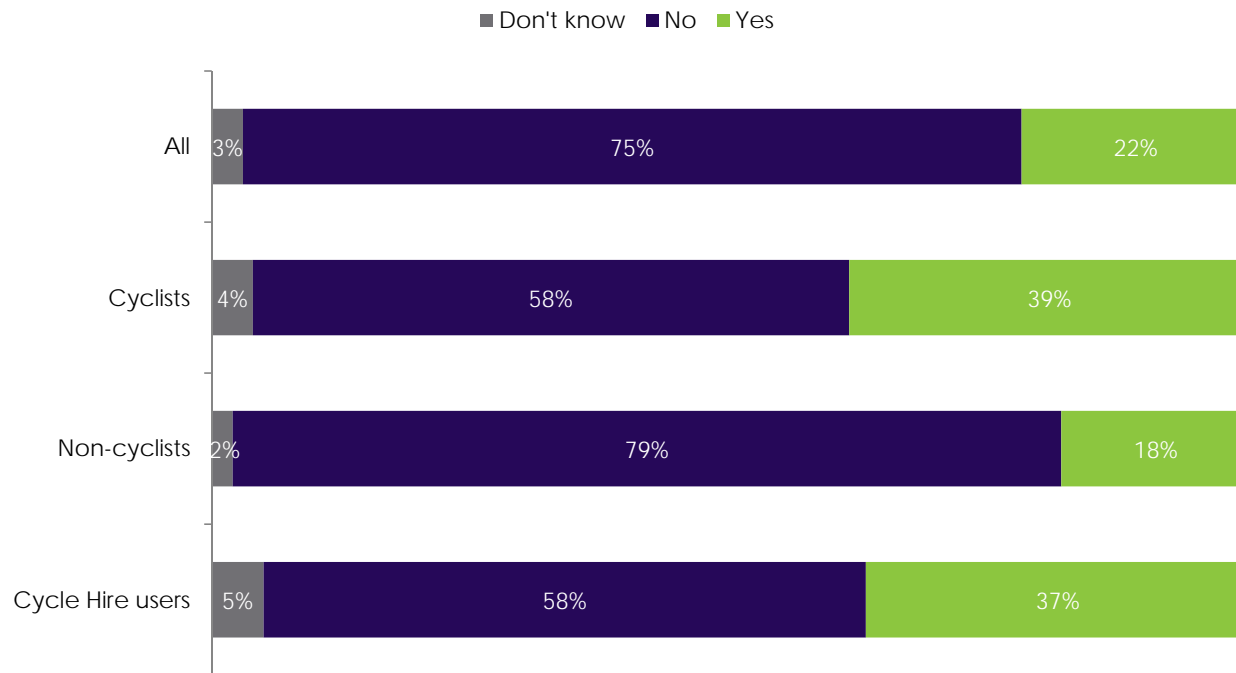
# Cycle Hire campaign recognition



Q16e. Have you been to this webpage before?  
Base: All Sept 2016 (2315)



# Awareness of Blaze Laserlight

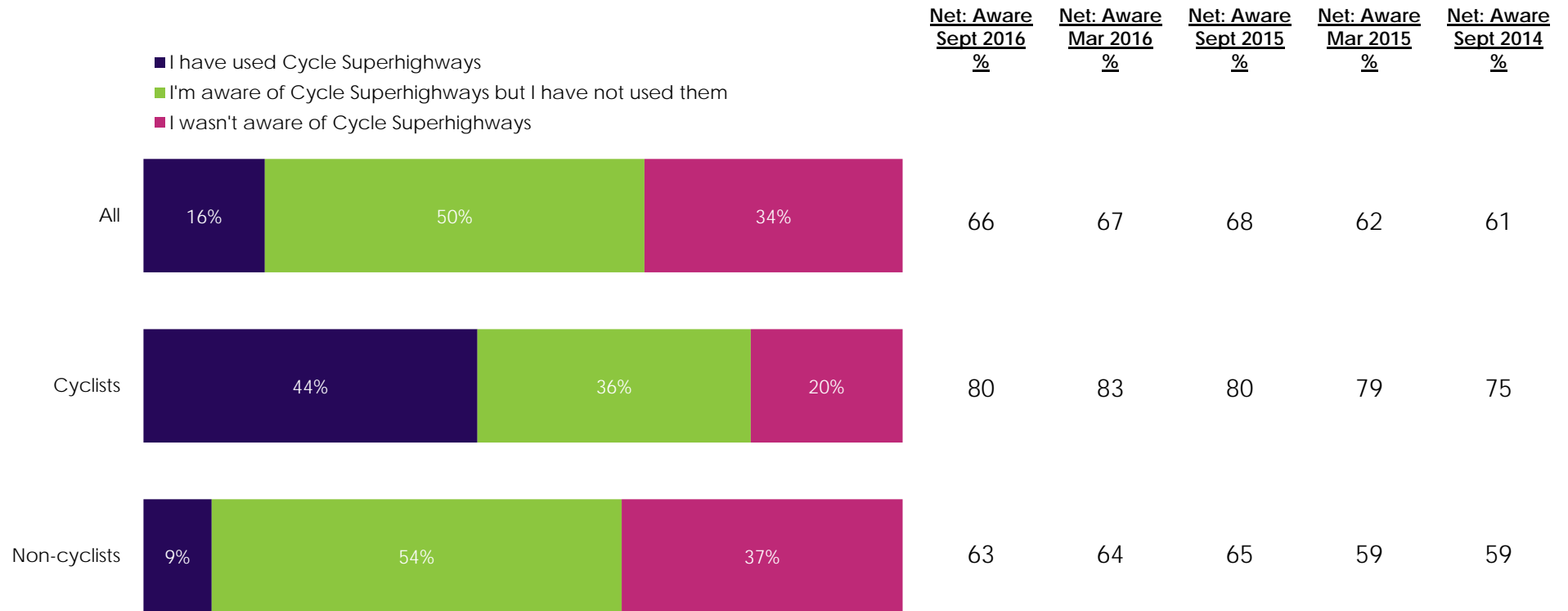


BL1. Blaze Laserlight is an additional safety feature which projects a green bicycle-shaped laser image onto the ground 7 metres ahead of the bicycle, that is currently being rolled out to all Santander Cycles bikes. Before today, had you heard of the Blaze Laserlight? Base: Sept 2016 All (1347), cyclists (311), non-cyclists (1031), Cycle Hire users (287)



# Cycle Superhighways

# Awareness of Cycle Superhighways



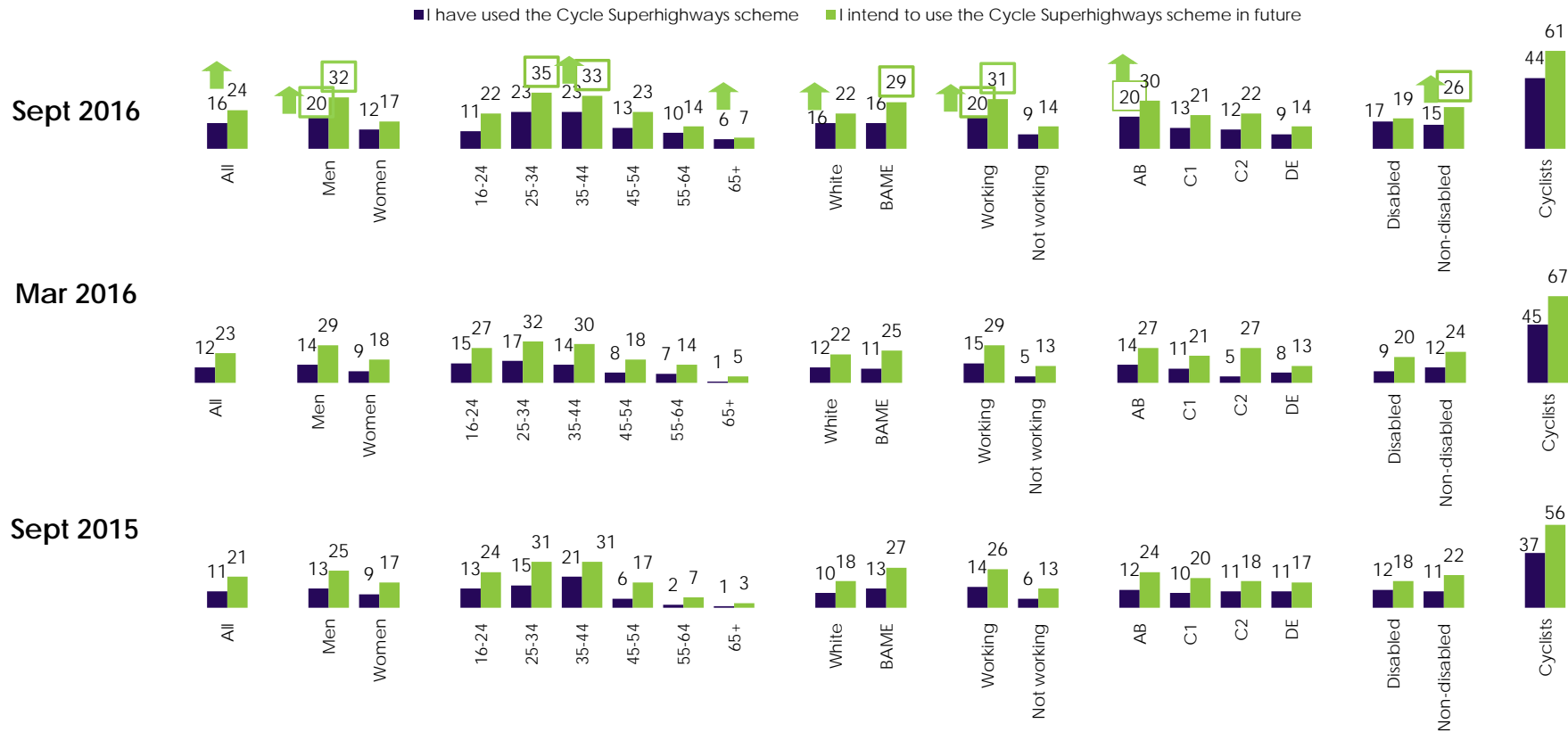
Significantly up or down vs. March 2016

M10. For the following schemes, which of the following best applies to you? - Cycle Superhighways?

Base: All – Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180); Cyclists – Sept 2016 (311), Mar 2016 (307), Sept 2015 (282), Mar 2015 (269), Sept 2014 (294); Non-cyclists – Sept 2016 (1031), Mar 2016 (1067), Sept 2015 (882), Mar 2015 (945), Sept 2014 (886)



# Current and intended use of Cycle Superhighways



Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

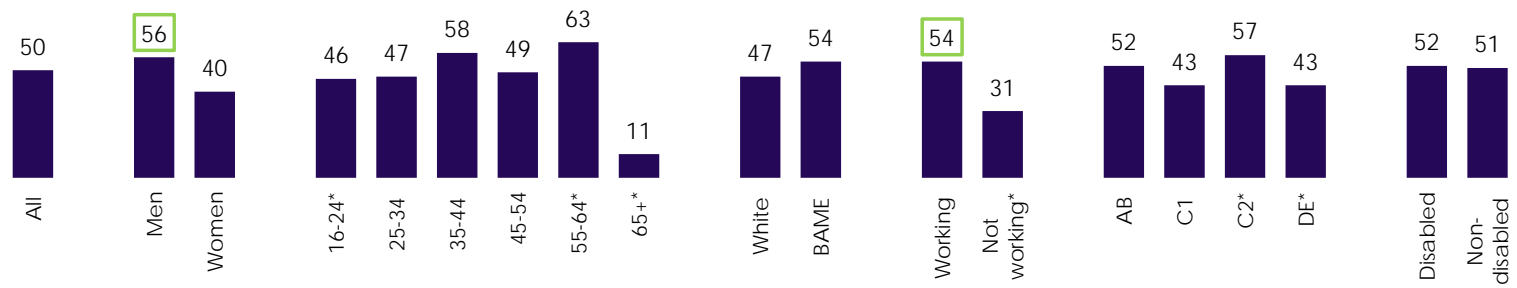
M10. For the following schemes, which of the following best applies to you? - Cycle Superhighways  
 M11. In the next 12 months do you intend to use...? - Cycle Superhighways?  
 Base: All – Sept 2016 (1347) Mar 2016 (1379), Sept 2015: (1164)

# Use of Cycle Superhighways in the last month



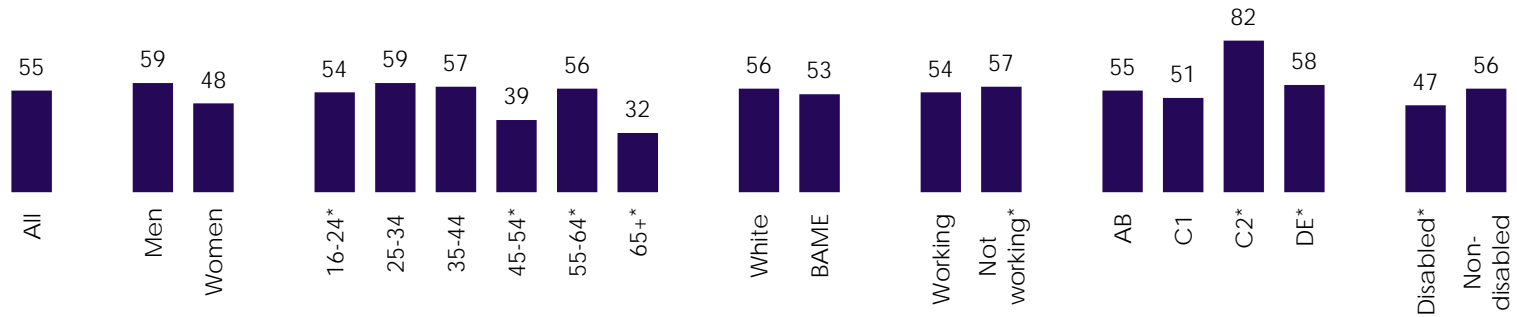
Sept 2016

■ I have used the Cycle Superhighways in the last month



Mar 2016

■ I have used the Cycle Superhighways in the last month



Significantly higher / lower vs. subgroup

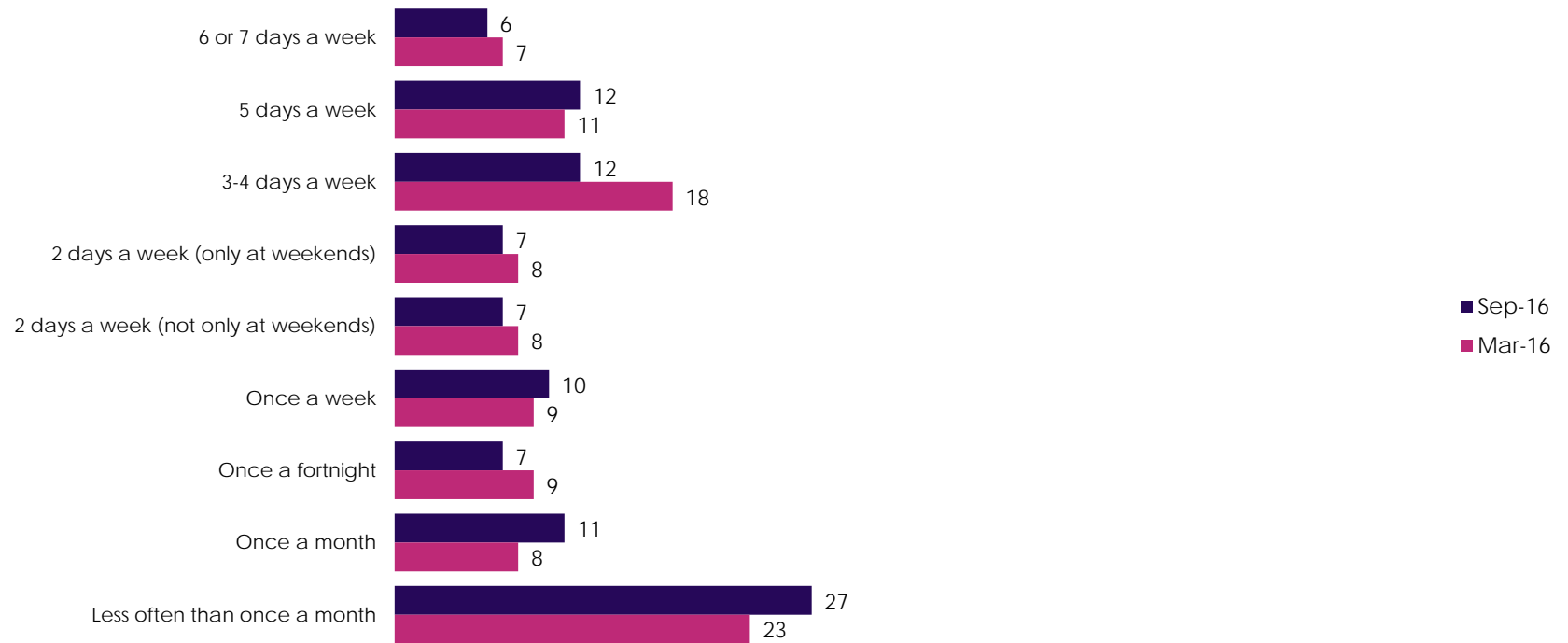
Significantly up or down vs. March 2016



M14. Have you used any of the following in the last month? – Cycle Superhighways

Base: All who have ever used the Cycle Superhighways – Sept 2016(231), Mar 2016 (191) \*caution – low base sizes



# Frequency of use of Cycle Superhighways



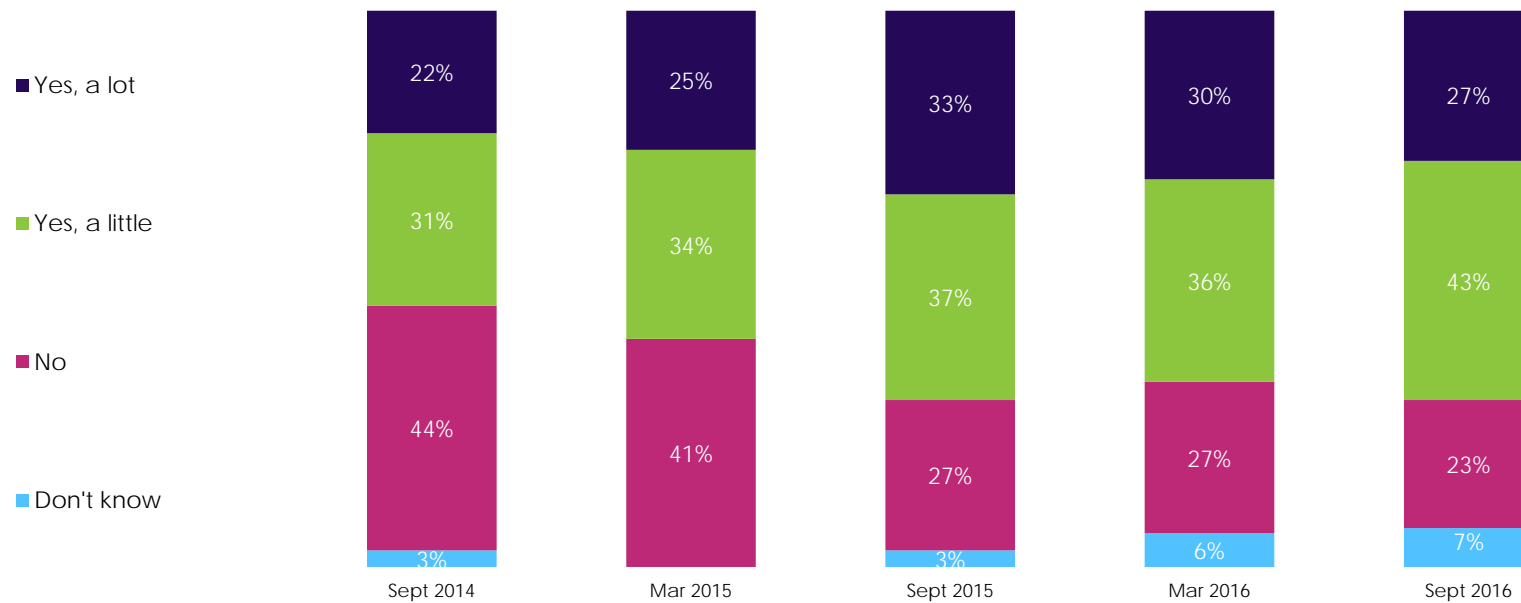
  Significantly up or down vs. March 2016

M13. How often do you currently use the Cycle Superhighways?

Base: All who have ever used the Cycle Superhighways – Sept 2016 (231), Mar 2016 (191)



# Impact of Cycle Superhighways on cycling among current users



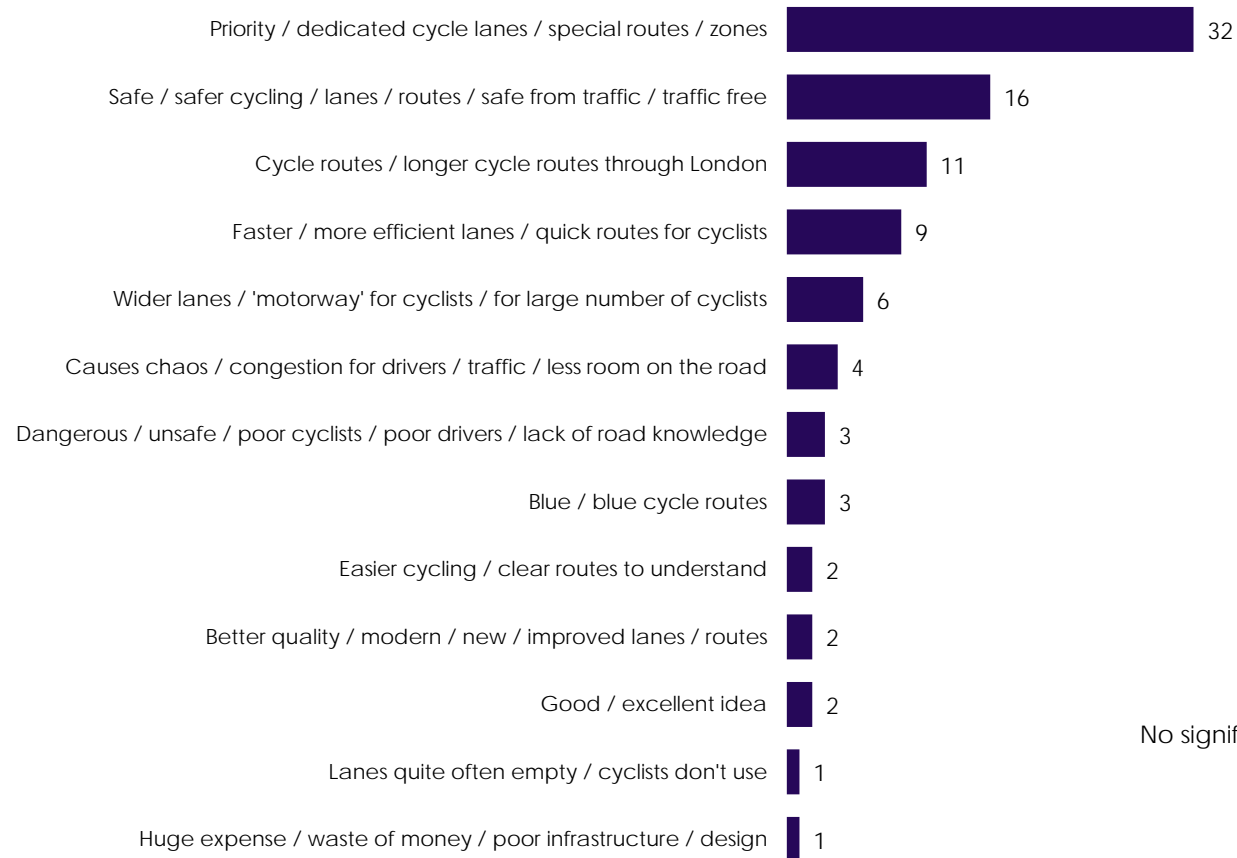
Significantly up or down vs. March 2016

N5a. To what extent would you say the Cycle Superhighways have encouraged you to increase the amount that you cycle?

Base: All users – Sept 2016 (231), Mar 2016 (191), Sept 2015 (144), Mar 2015 (120), Sept 2014 (140)



# What the name 'Cycle Superhighways' means to people

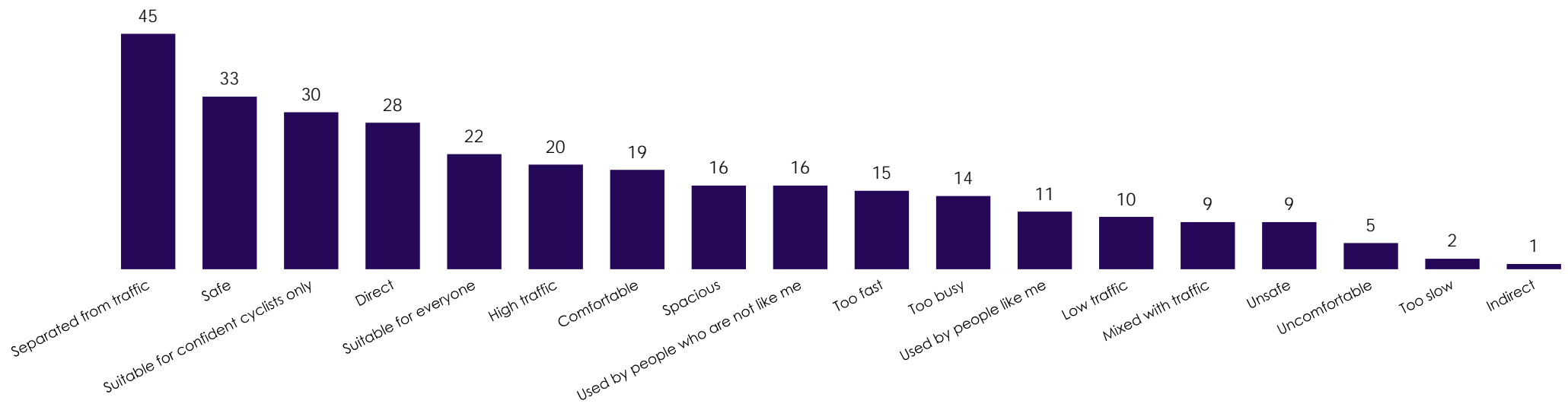


No significant differences between men and women

CSH2. What does the name Cycle Superhighway mean to you?

Base: All aware of Cycle Superhighways – Sept 2016 (930)

# What the name 'Cycle Superhighways' means to people



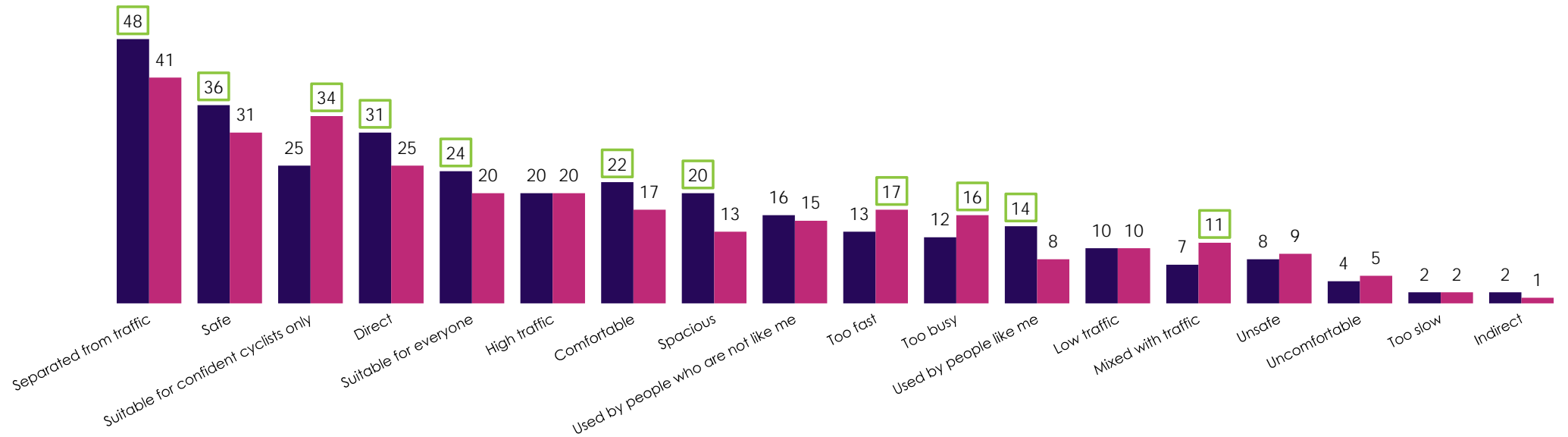
CSH3. Based on the name, would you say that Cycle Superhighways sound:  
Base: All – Sept 2016 (2315)



# What the name 'Cycle Superhighways' means to people

%

■ Men ■ Women



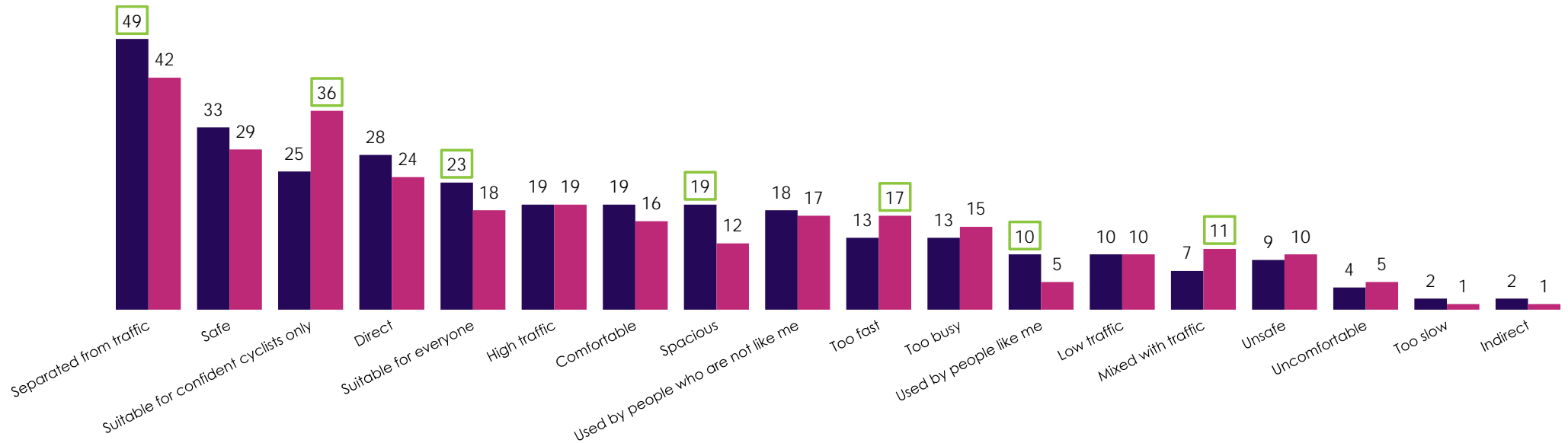
Significantly higher / lower vs. subgroup


CSH3. Based on the name, would you say that Cycle Superhighways sound:  
 Base: All Sept 2016 – Men (1044), Women (1271)

# What the name 'Cycle Superhighways' means to non-cyclists

%

■ Men Non-cyclists ■ Women Non-cyclists

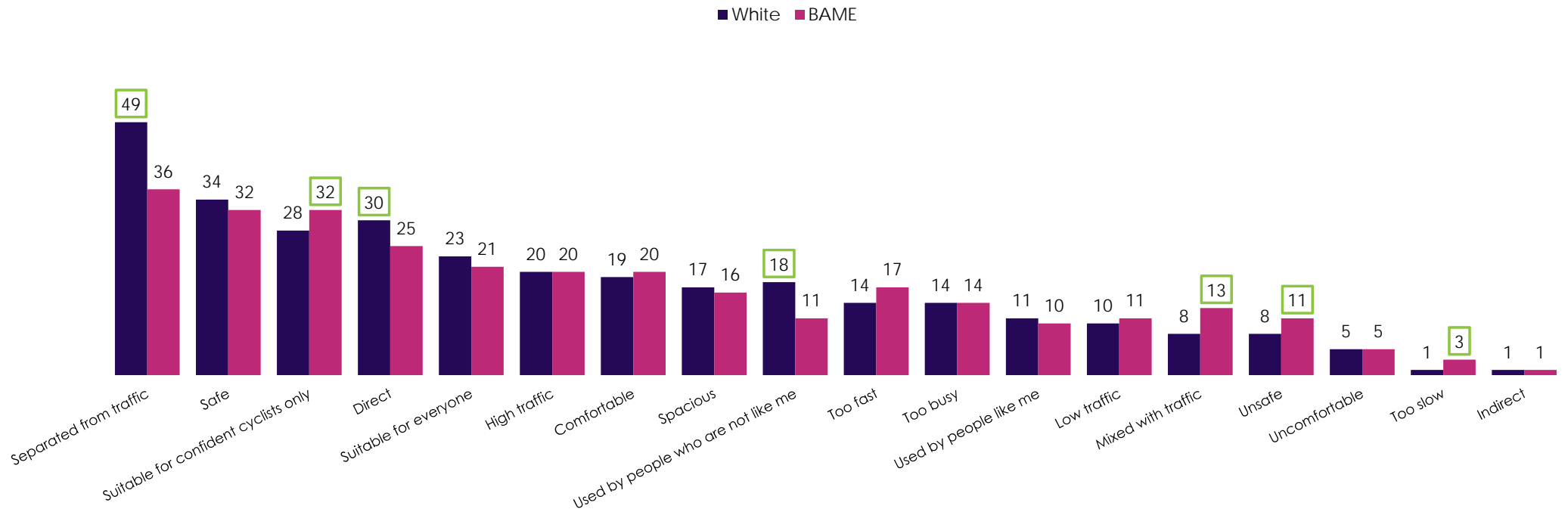


 Significantly higher / lower vs. subgroup

CSH3. Based on the name, would you say that Cycle Superhighways sound:  
 Base: All Sept 2016 – Men non-cyclists (760), Women non-cyclists (1040)



# What the name 'Cycle Superhighways' means to people

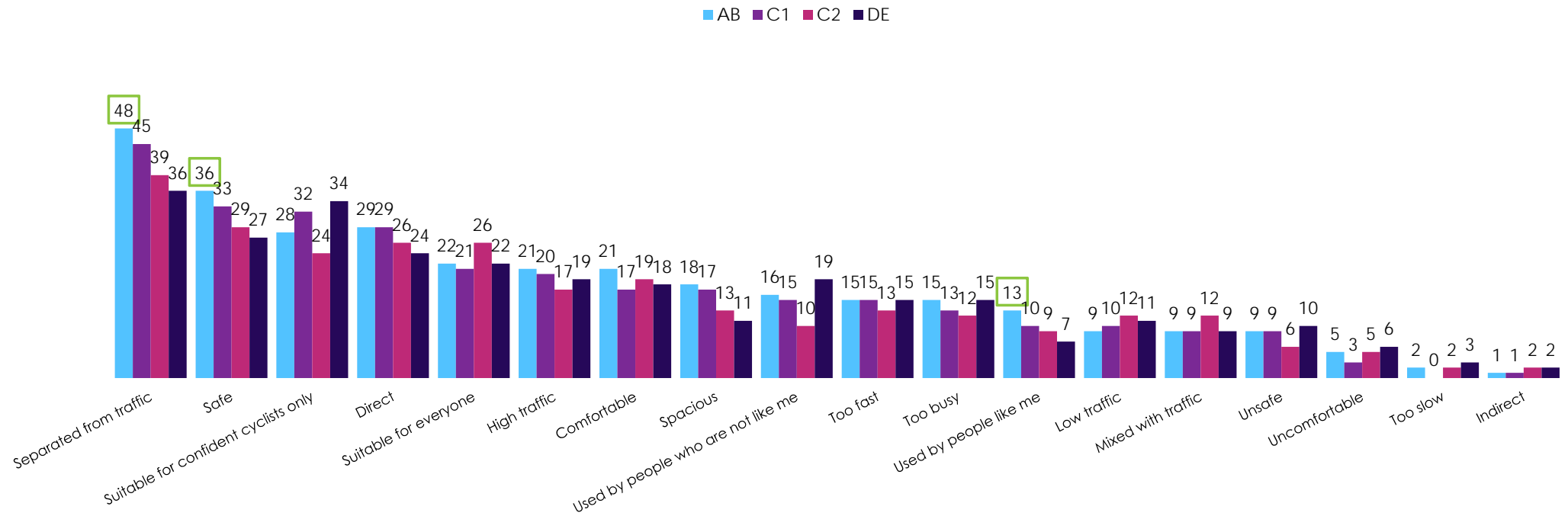


Significantly higher / lower vs. subgroup

CSH3. Based on the name, would you say that Cycle Superhighways sound:  
 Base: All Sept 2016 – White (1722), BAME (593)

# What the name 'Cycle Superhighways' means to people

%



Significantly higher / lower vs. subgroup

CSH3. Based on the name, would you say that Cycle Superhighways sound:  
 Base: All Sept 2016 – AB (1118), C1 (735), C2 (209), DE (243)



The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized letter 'A' or a similar abstract form, composed of several triangular and quadrilateral sections. The text 'Other cycling initiatives' is centered horizontally and vertically within the green area.

# Other cycling initiatives

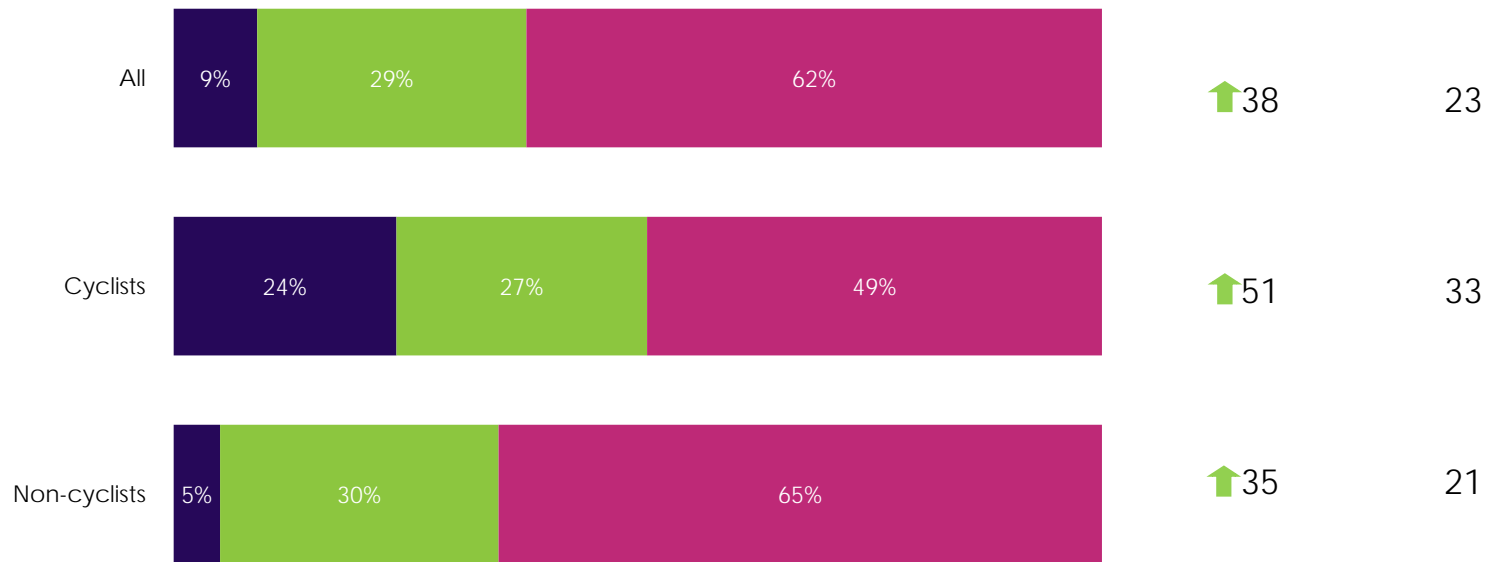
# Awareness and use of the Central London Grid



- I have used the Central London Grid
- I'm aware of the Central London Grid but have not used it
- I wasn't aware of the Central London Grid

**Net: Aware**  
**Sept 2016**  
**%**

**Net: Aware**  
**Mar 2016**  
**%**



**57% of users have done so in the last month**

↑↓ Significantly up or down vs. March 2016

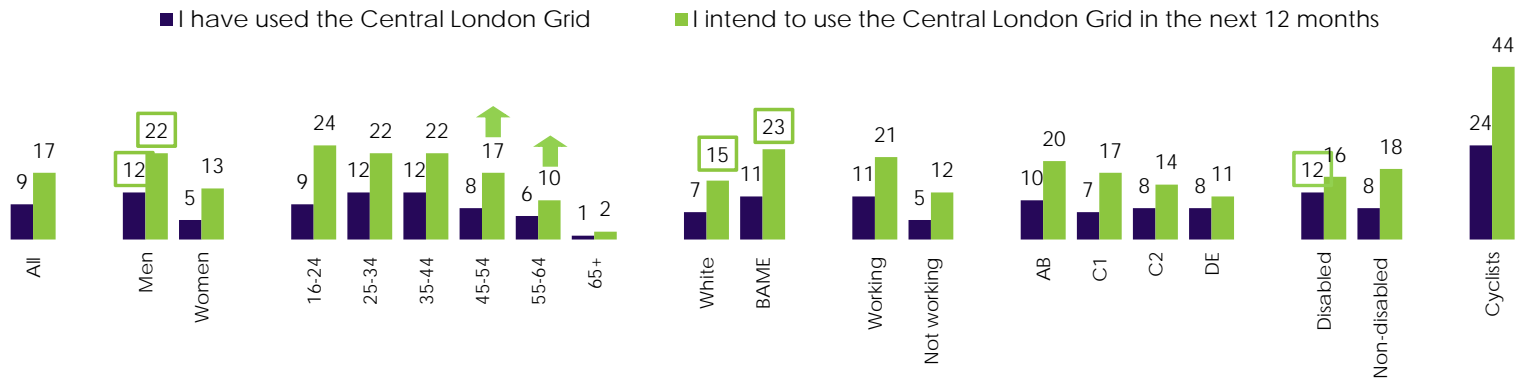
M10. For the following schemes, which of the following best applies to you? – Central London Grid ? Base: Sept 2016 All (1347), all cyclists (311), all non-cyclists (1031); Mar 2016 All (1379), all cyclists (307), all non-cyclists (1067)  
 M14. Have you used the Central London Grid in the last month? Base: All users Sept 2016 (120)



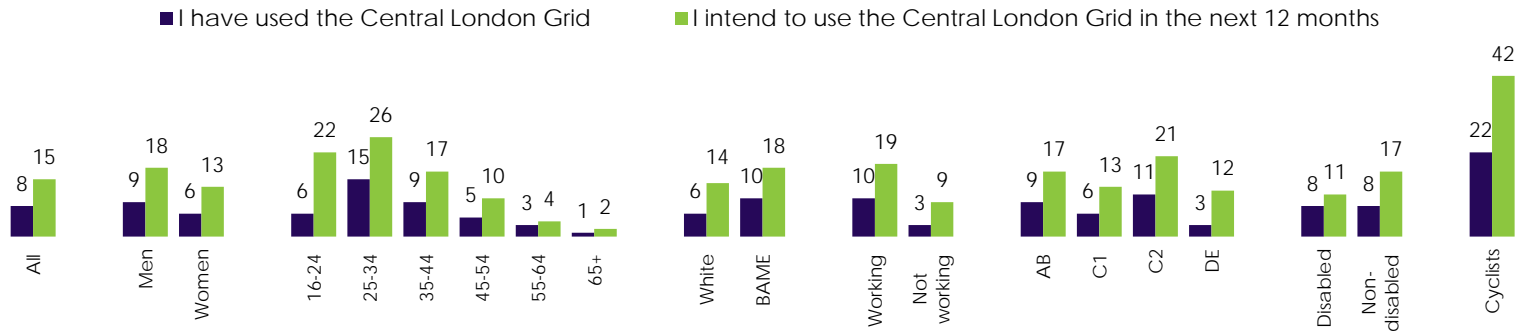
# Current and intended use of the Central London Grid



Sept 2016



Mar 2016



Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

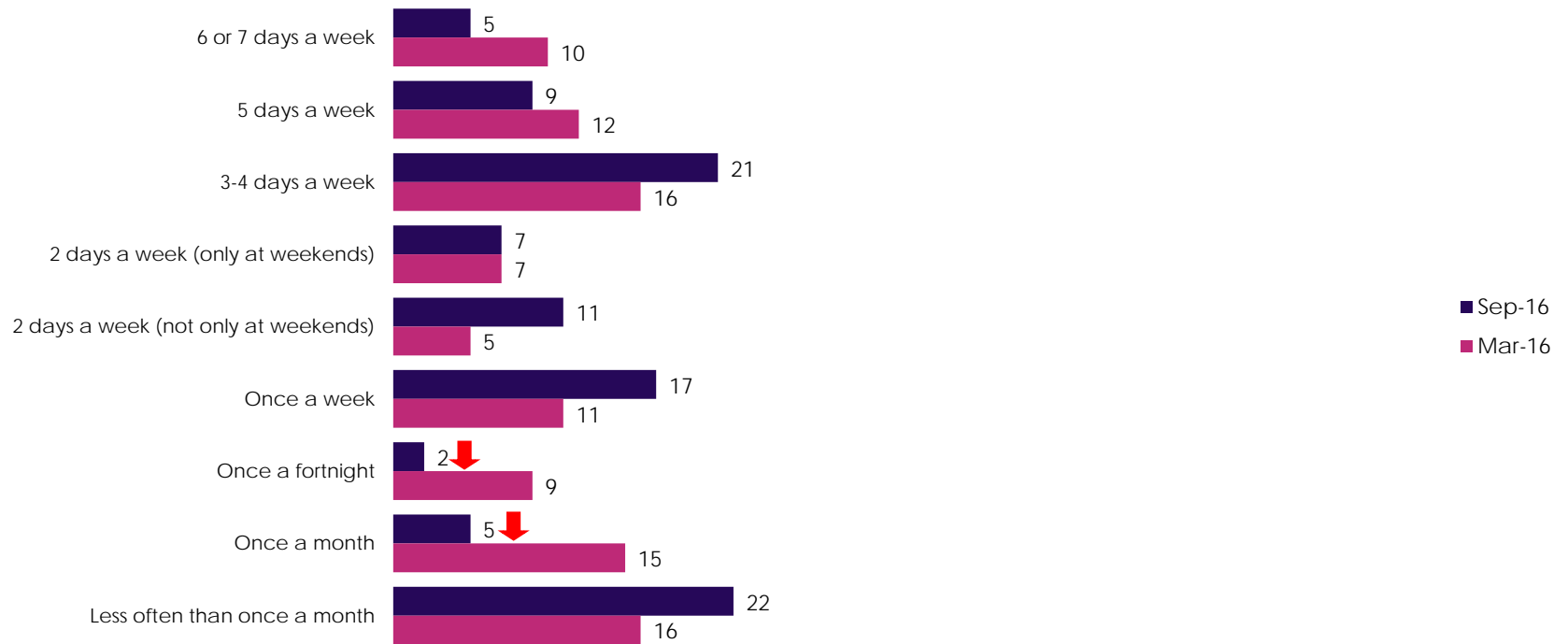
M10. For the following schemes, which of the following best applies to you? – Central London Grid

M11. In the next 12 months do you intend to use...? - Central London Grid

Base: All – Sept 2016 (1347), Mar 2016 (1379)



# Frequency of use of the Central London Grid



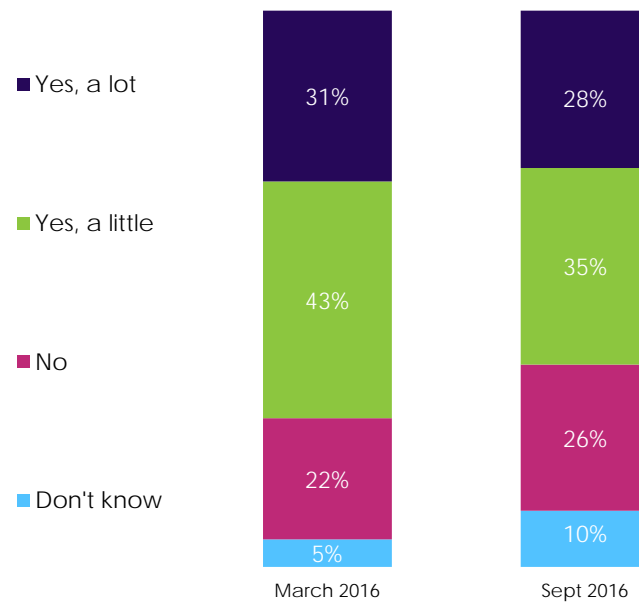
Significantly up or down vs. March 2016



M13. How often do you currently use the Central London Grid ?

Base: All who have ever used the Central London Grid – Sept 2016 (120), Mar 2016 (113)



# Impact of the Central London Grid on cycling



  Significantly up or down vs. March 2016

N5a. To what extent would you say the Central London Grid has encouraged you to increase the amount that you cycle?  
Base: All users – Sept 2016 (120), Mar 2016 (113)



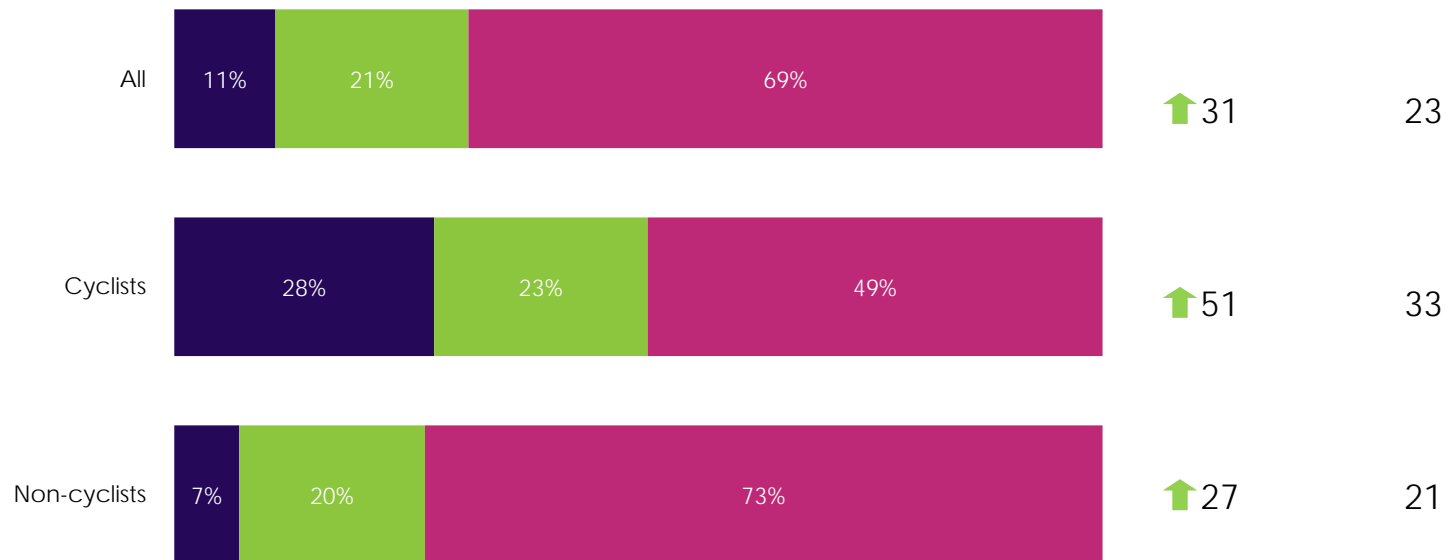
# Awareness of Quietways



- I have used Quietways
- I'm aware of Quietways but have not used them
- I wasn't aware of Quietways

Net: Aware  
Sept 2016  
%

Net: Aware  
Mar 2016  
%



**55% of users have done so in the last month**

↑ ↓ Significantly up or down vs. March 2016

M10. For the following schemes, which of the following best applies to you? - Quietways? Base: Sept 2016 All (1347), all cyclists (311), all non-cyclists (1031) Mar 2016 All (1379), all cyclists (307), all non-cyclists (1067)

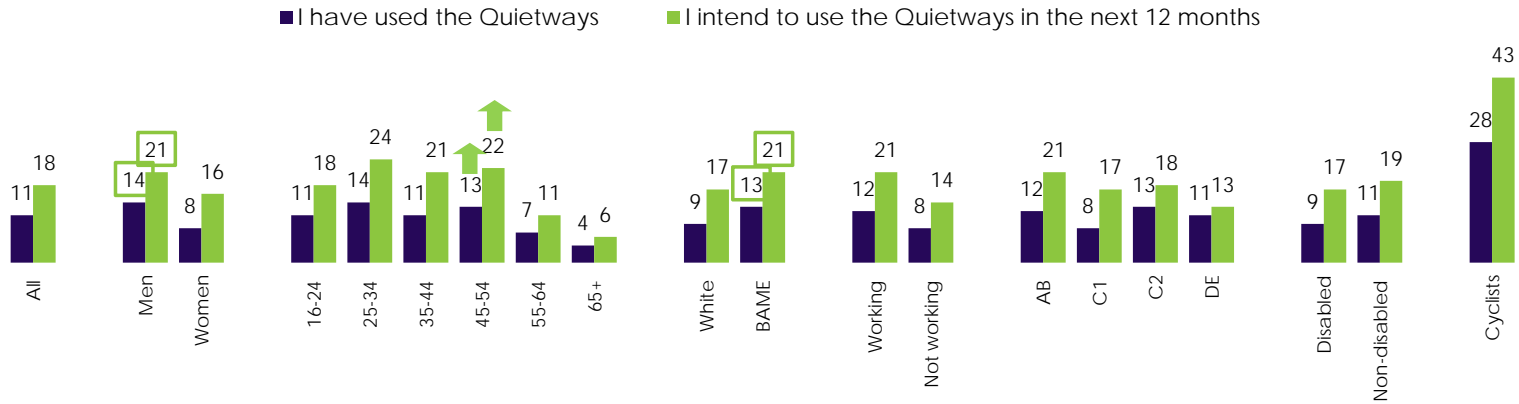
M14. Have you used the Quietways in the last month? Base: All users Sept (148)



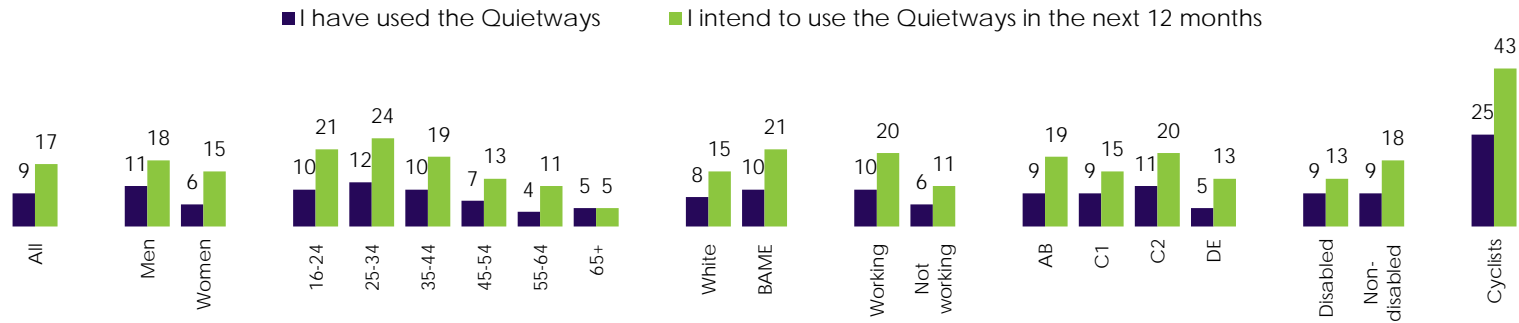
# Current and intended use of Quietways



Sept 2016



Mar 2016



Significantly higher / lower vs. subgroup

Significantly up or down vs. March 2016

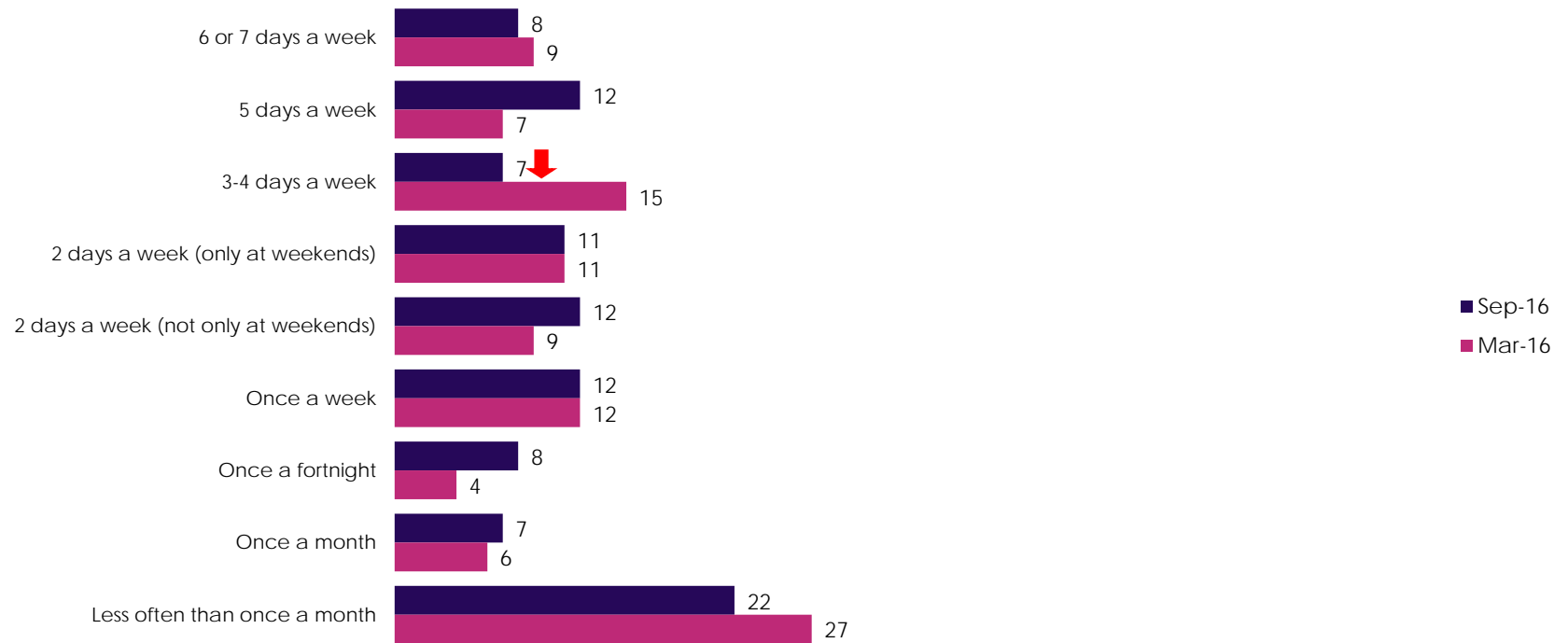
M10. For the following schemes, which of the following best applies to you? - Quietways

M11. In the next 12 months do you intend to use...? - Quietways

Base: All - Sept 2016 (1347), Mar 2016 (1379)



# Frequency of use of Quietways

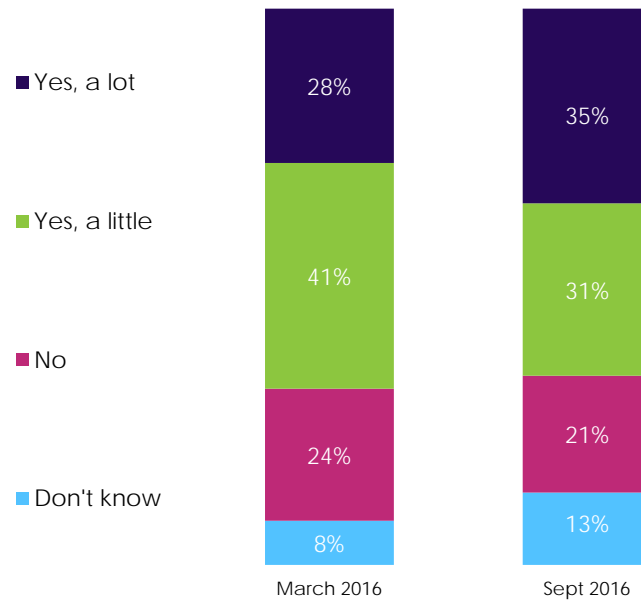




↓↑ Significantly up or down vs. March 2016

M13. How often do you currently use the Quietways ?

Base: All who have ever used the Quietways – Sept 2016 (148), Mar 2016 (131)

# Impact of Quietways on cycling



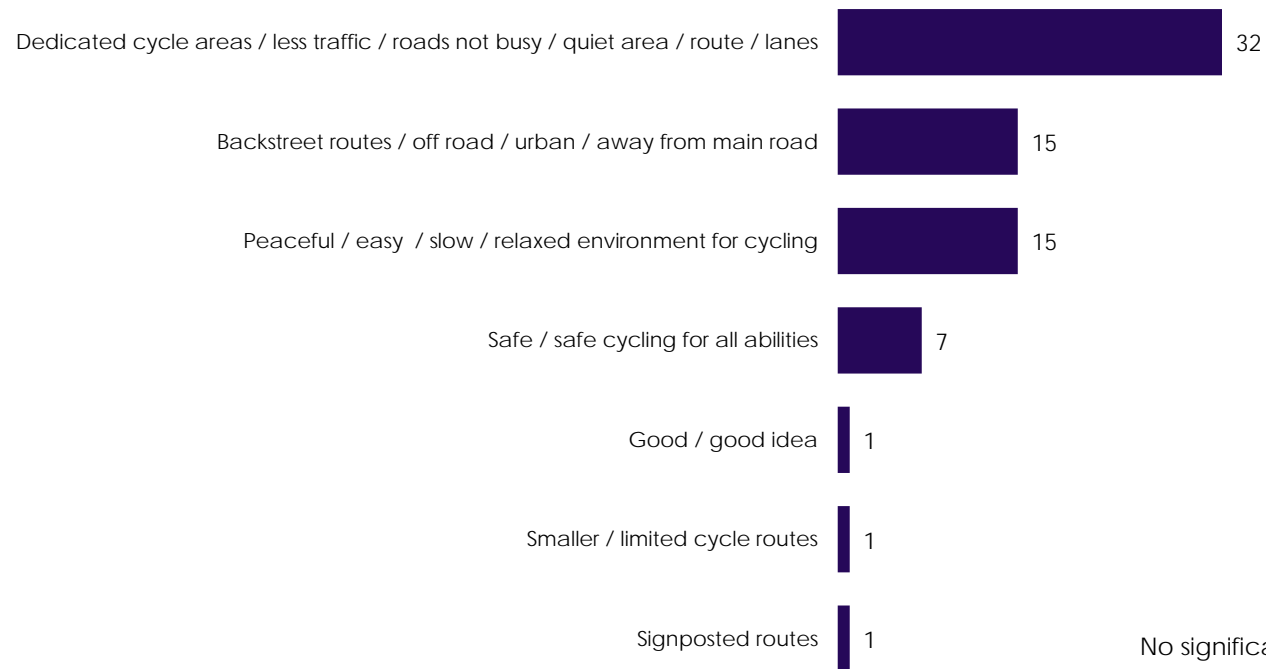
  Significantly up or down vs. March 2016

N5a. To what extent would you say the Quietways have encouraged you to increase the amount that you cycle?

Base: All users – Spring 2016 (148), Mar 2016 (131)



# What the name 'Cycle Quietways' means to people

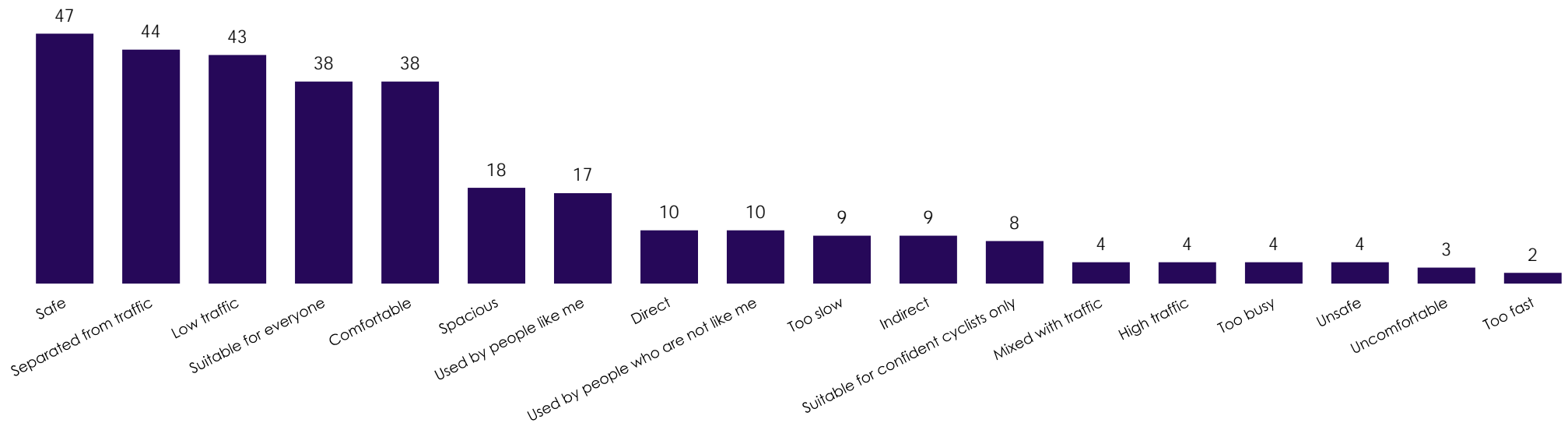


No significant differences between men and women

QW1. What does the name Cycle Quietway mean to you?  
Base: All aware of Cycle Quietways – Sept 2016 (433)



# What the name 'Cycle Quietways' means to people

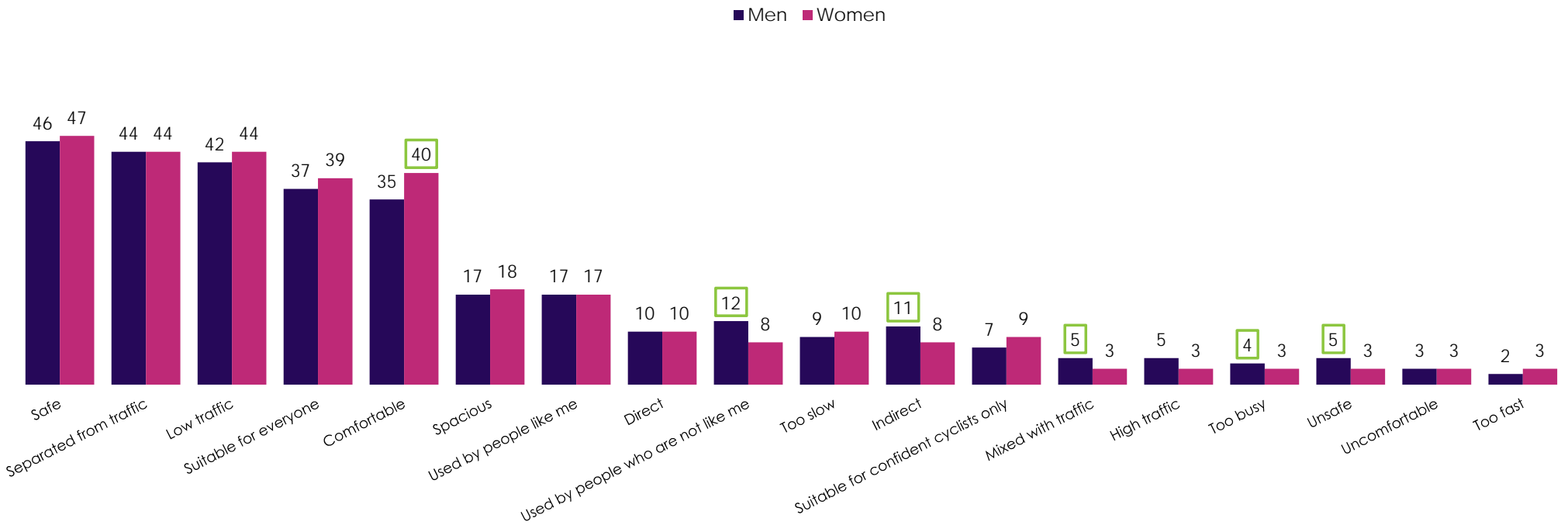


QW2. Based on the name, would you say that Cycle Quietways sound:  
Base: All – Sept 2016 (2315)



# What the name 'Cycle Quietways' means to people

%



Significantly higher / lower vs. subgroup

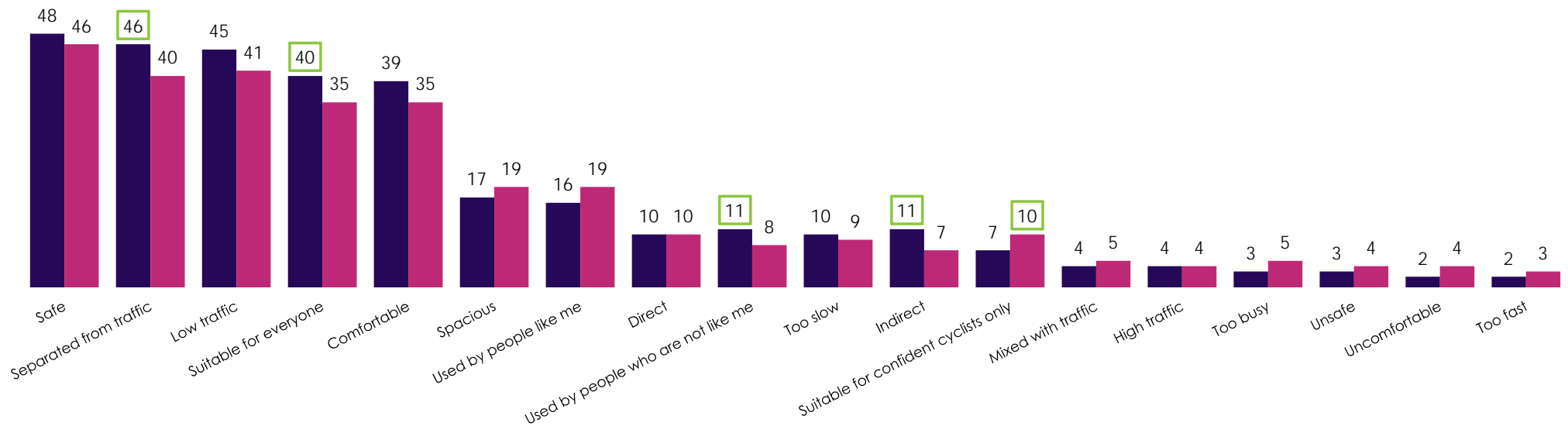
CSH3. Based on the name, would you say that Cycle Quietways sound:  
 Base: All – Men Sept 2016 (1044), Women Sept 2016 (1271)



# What the name 'Cycle Quietways' means to people

%

■ White ■ BAME



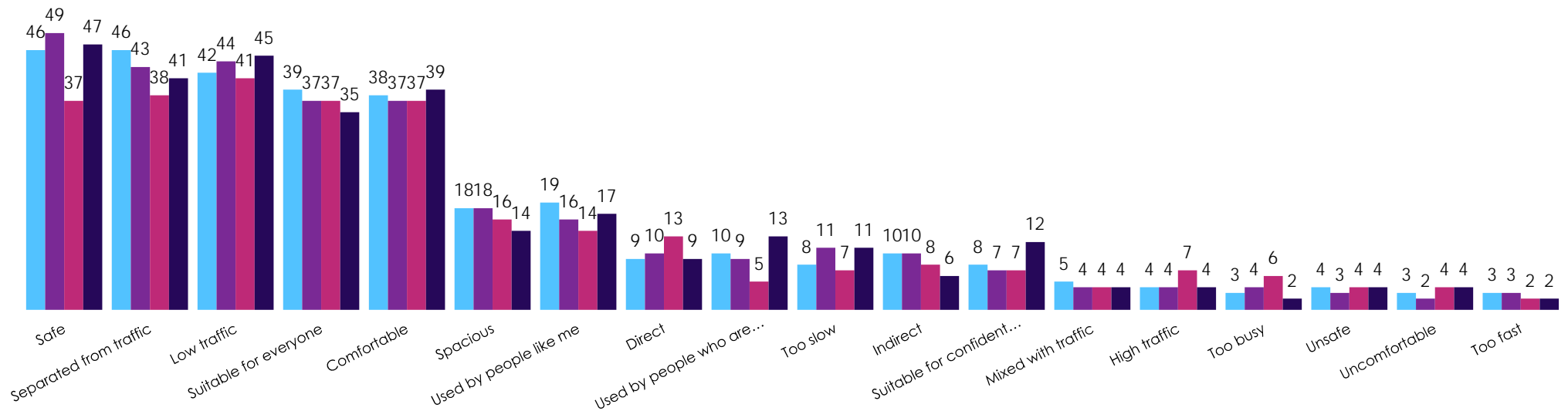
Significantly higher / lower vs. subgroup

CSH3. Based on the name, would you say that Cycle Quietways sound:  
 Base: All – White Sept 2016 (1722), BAME Sept 2016 (593)

# What the name 'Cycle Quietways' means to people

%

■ AB ■ C1 ■ C2 ■ DE



CSH3. Based on the name, would you say that Cycle Quietways sound:

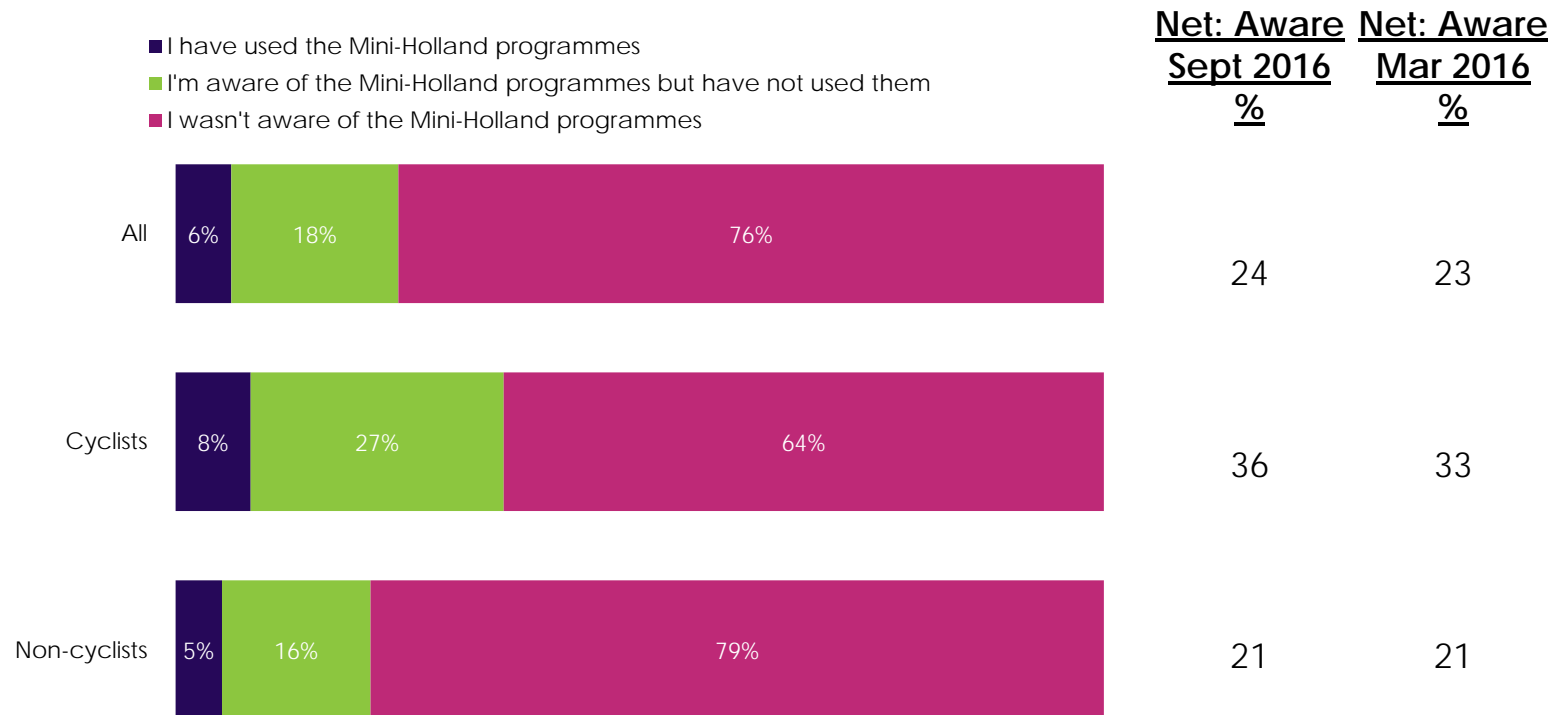
Base: All – AB Sept 2016 (1118), C1 Sept 2016 (735), C2 Sept 2016 (209), DE Sept 2016 (243)





# Awareness of Mini-Holland programmes

%

- I have used the Mini-Holland programmes
- I'm aware of the Mini-Holland programmes but have not used them
- I wasn't aware of the Mini-Holland programmes



**55% of users have done so in the last month**



 Significantly up or down vs. March 2016

M10. For the following schemes, which of the following best applies to you? - Mini-Holland programmes? Base: Sept 2016 All (1347), all cyclists (311), all non-cyclists (1031) Mar 2016 All (1379), all cyclists (307), all non-cyclists (1067)  
 M14. Have you used the Mini-Holland programmes in the last month? Base: All users Sept 2016 (72)

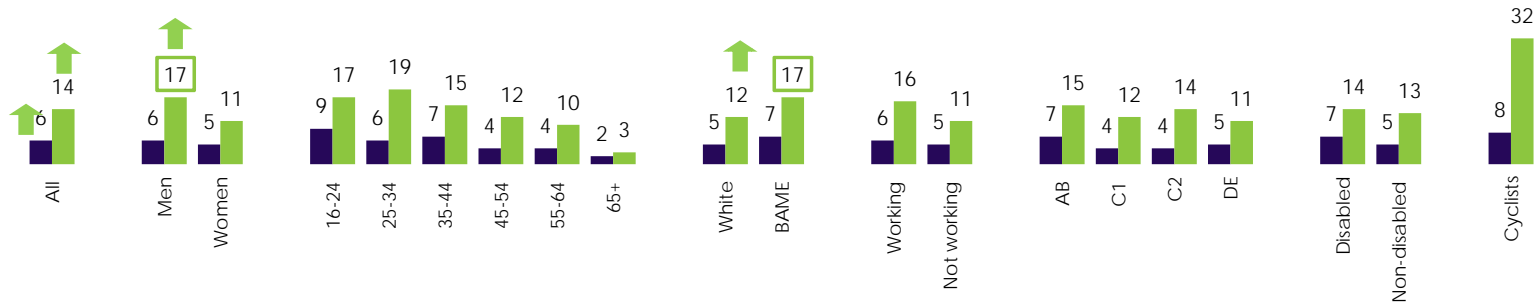
# Current and intended use of Mini-Holland programmes



Sept 2016

■ I have used the Mini-Holland programmes

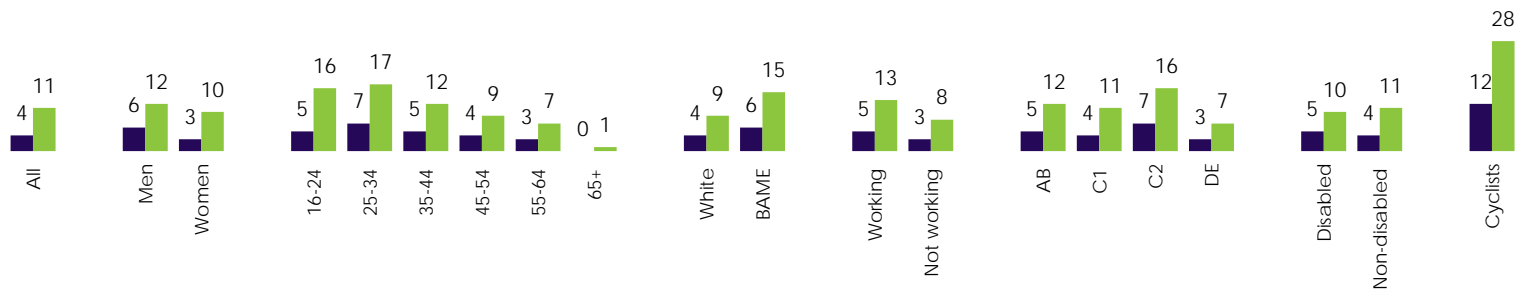
■ I intend to use the Mini-Holland programmes in the next 12 months



Mar 2016

■ I have used the Mini-Holland programmes

■ I intend to use the Mini-Holland programmes in the next 12 months



Significantly higher / lower vs. subgroup  
 Significantly up or down vs. March 2016

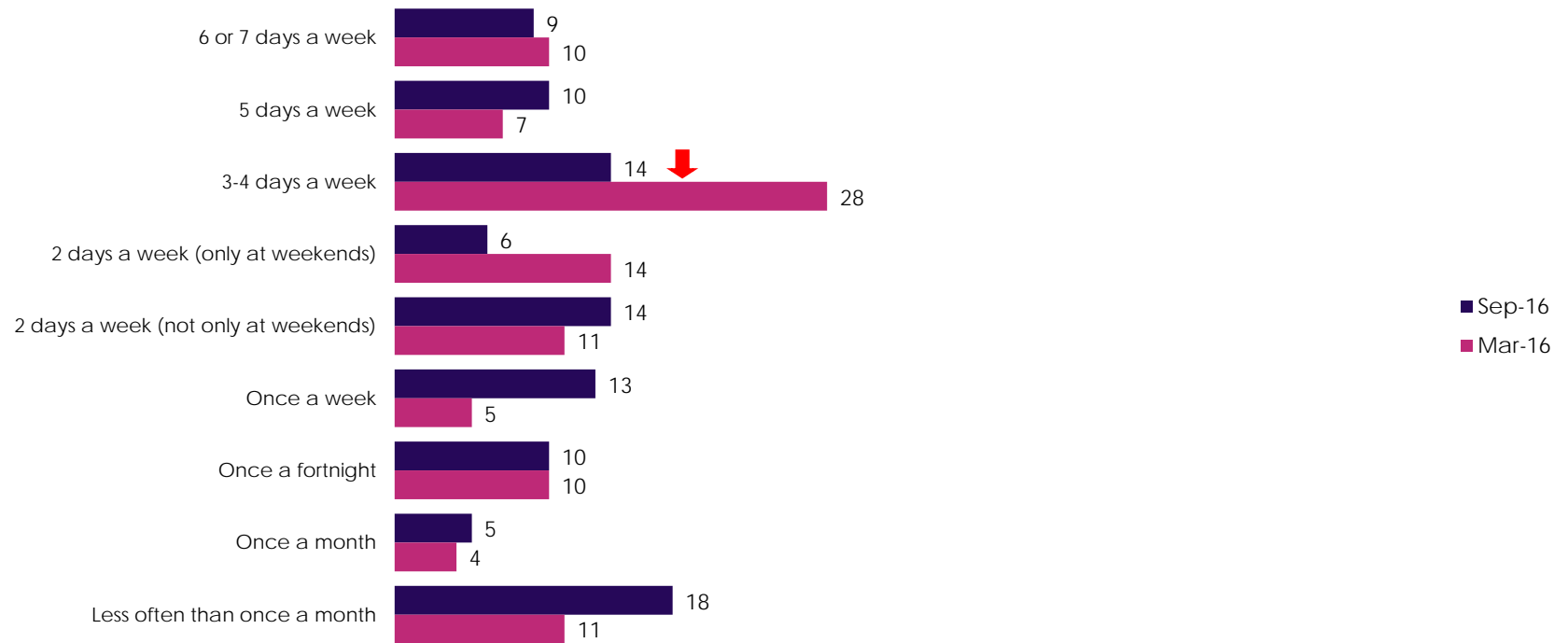
M10. For the following schemes, which of the following best applies to you? - Mini-Holland programmes



M11. In the next 12 months do you intend to use...? - Mini-Holland programmes

Base: All - Sept 2016 (1347), Mar 2016 (1379)



# Frequency of use of Mini-Holland programmes

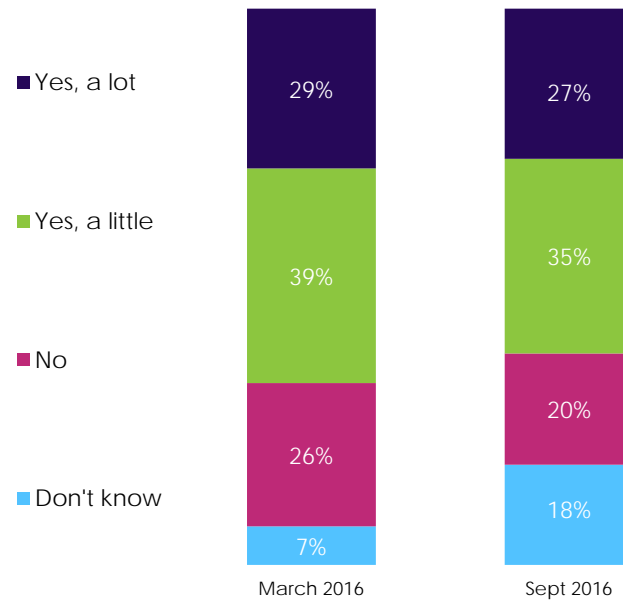




  Significantly up or down vs. March 2016

M13. How often do you currently use the Mini-Holland programmes?

Base: All who have ever used the Mini-Holland programmes – Sept 2016 (72), Mar 2016 (57)

# Impact of Mini-Holland programmes on cycling



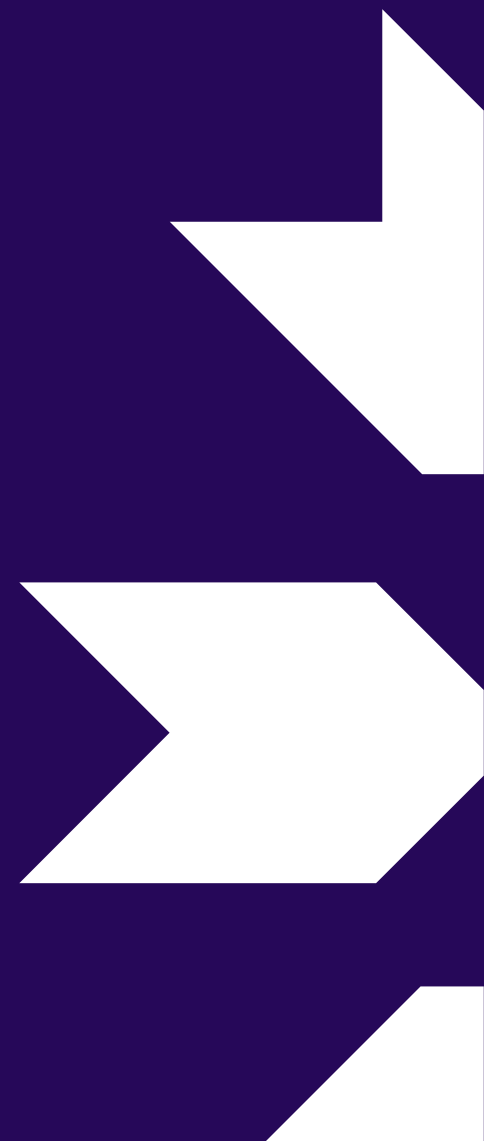
  Significantly up or down vs. March 2016

N5a. To what extent would you say the Mini-Holland programmes have encouraged you to increase the amount that you cycle?

Base: All users – Sept 2016 (72), Mar 2016 (57)



# Cycling events



# Impact of Prudential RideLondon 2016 on cycling levels



■ Taken up cycling   
 ■ Cycled much more   
 ■ Cycled slightly more   
 ■ No difference   
 ■ Cycled slightly less   
 ■ Cycled much less



↓ ↑ Significantly up or down vs. March 2016

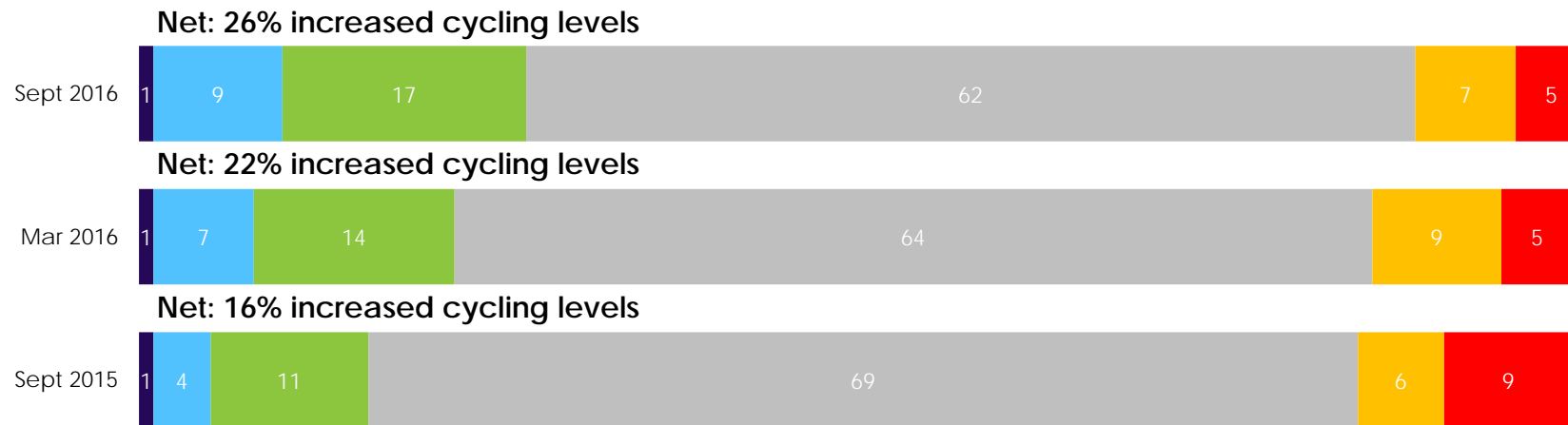
PRL1. Since watching / taking part in Prudential RideLondon in 2016, have you taken up cycling or cycled any more or less than before?

Base: All who watched or took part in PRL – Sept 2016 (228), Mar 2016 (202), Sept 2015 (246) Mar 2015 (222)

# Impact of Tour of Britain 2016 on cycling levels



■ Taken up cycling    
 ■ Cycled much more    
 ■ Cycled slightly more    
 ■ No difference    
 ■ Cycled slightly less    
 ■ Cycled much less



↓ ↑ Significantly up or down vs. March 2016

TOB1. Since watching the Tour of Britain in 2016, have you taken up cycling or cycled any more or less than before?  
 Base: All who watched Tour of Britain in 2015: Sept 2016 (241), Mar 2016 (234), Sept 2015 (275)

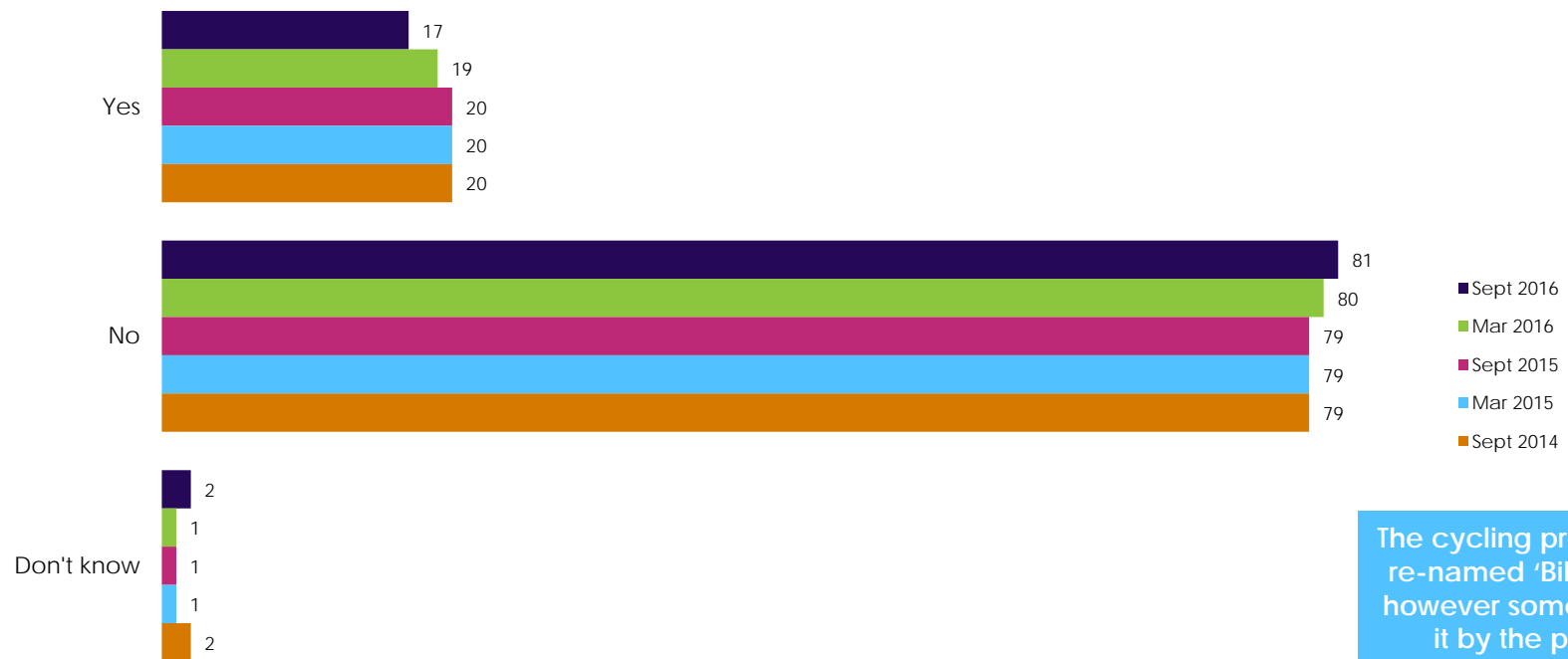






Cycle training



# Experience of cycle training



The cycling proficiency test was re-named 'Bikeability' in 2007; however some may still refer to it by the previous name

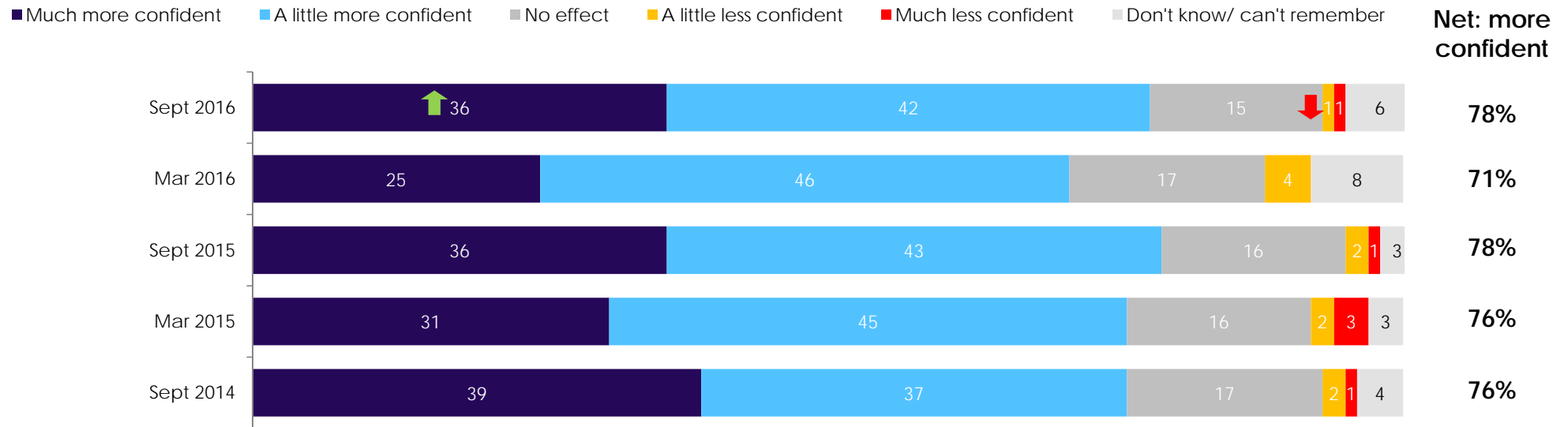

 Significantly up or down vs. March 2016

Q1: Have you ever attended any cycle training?

Base: all – Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180)



# Impact of Cycle training



Significantly up or down vs. March 2016

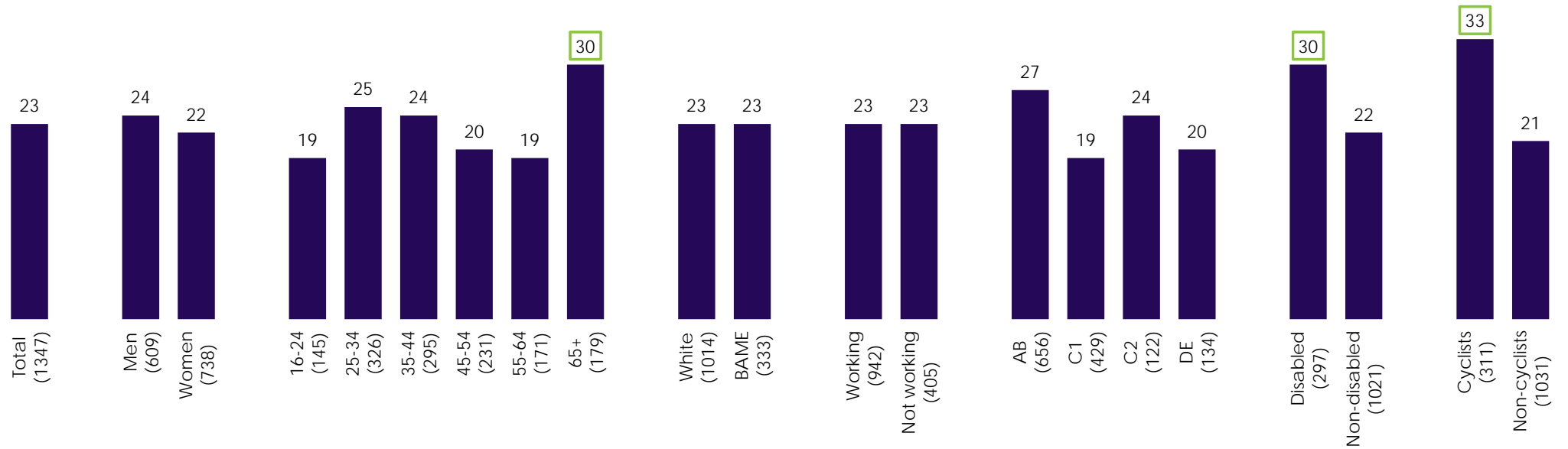
Q4. What effect did this cycle training have on your cycling confidence?

Base: All who have attended cycle training: Sept 2016 (231), Mar 2016 (254), Sept 2015 (235), Mar 2015 (263), Sept 2014 (244), Sept 2013 (312)

# Awareness that local councils offer free / subsidised cycle training



■ Sept 2016



Significantly higher / lower vs. subgroup

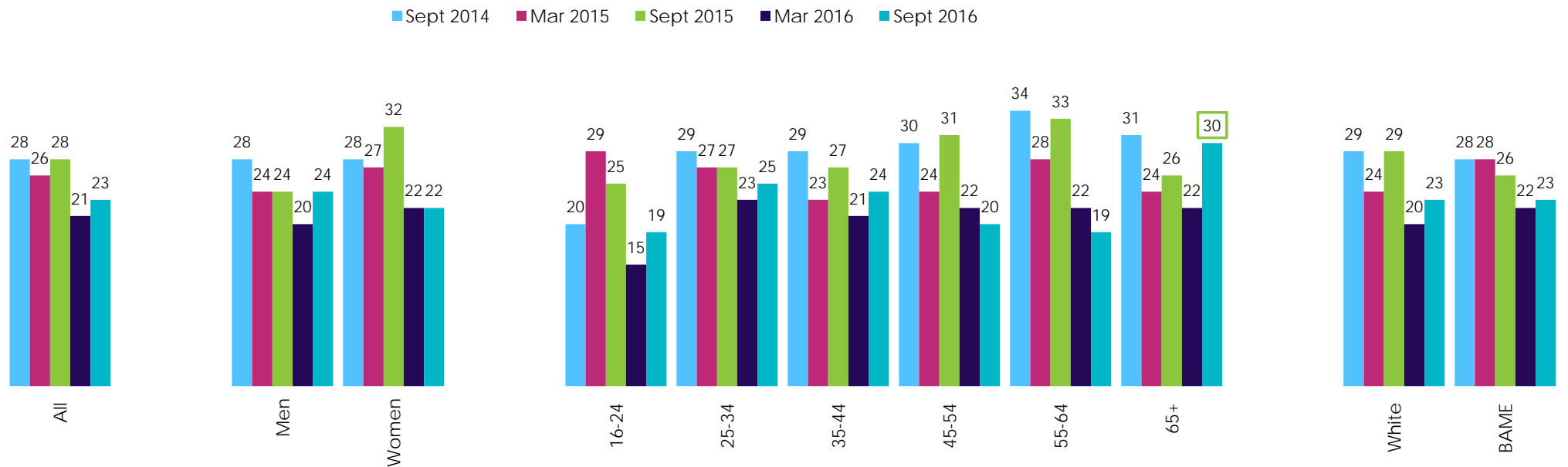
Q6. Are you aware that all local councils offer free / subsidised cycle training for adults and children with a qualified instructor?



Base: all Sept 2016 (1347)



# Awareness that local councils offer free / subsidised cycle training

%



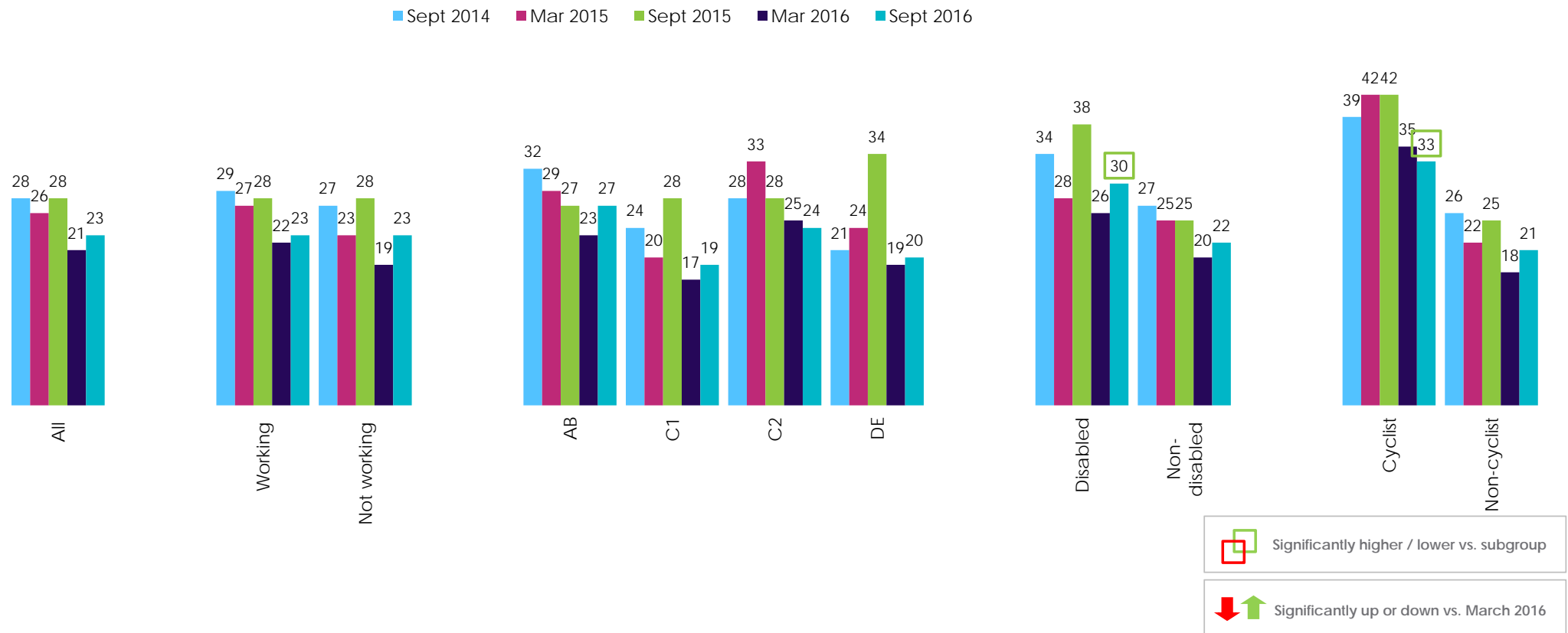


 Significantly up or down vs. March 2016

Q6. Are you aware that most local councils offer free / subsidised cycle training for adults and children with a qualified instructor?

Base: all Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180)

# Awareness that local councils offer free / subsidised cycle training

%



Q6. Are you aware that most local councils offer free / subsidised cycle training for adults and children with a qualified instructor?

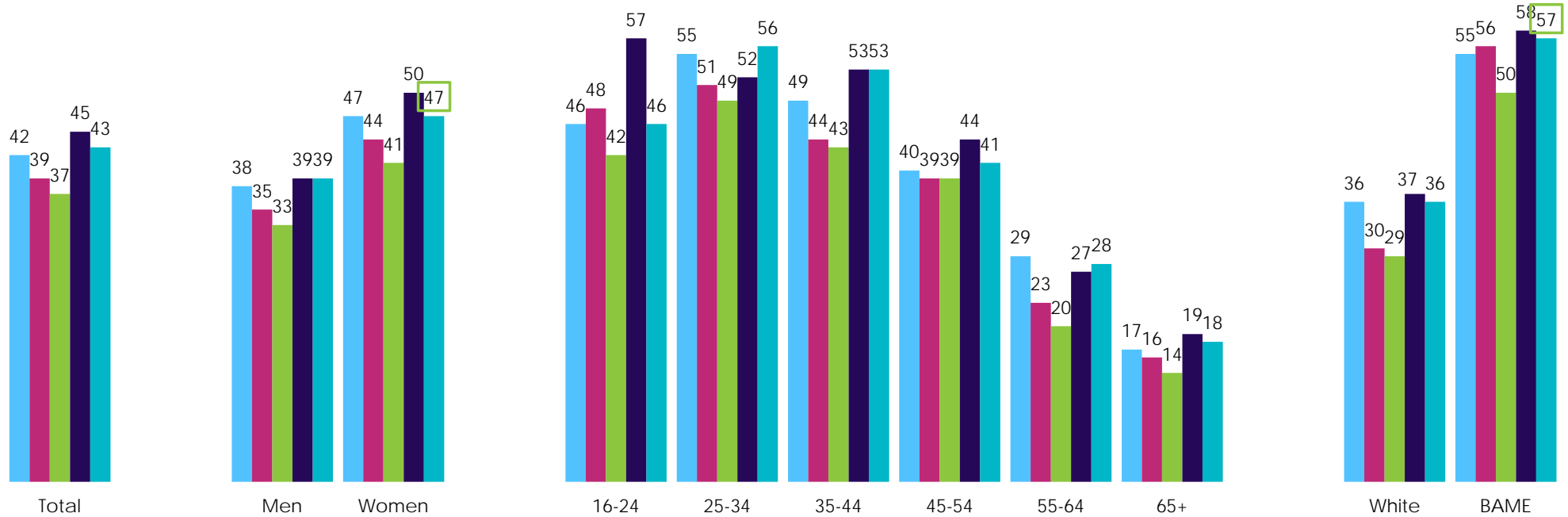
Base: all Sept 2016 (1347), Mar 2016(1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180)

# Propensity to take cycle training in the future

%

Would consider taking cycle training in future

■ Sept 2014 ■ Mar 2015 ■ Sept 2015 ■ Mar 2016 ■ Sept 2016



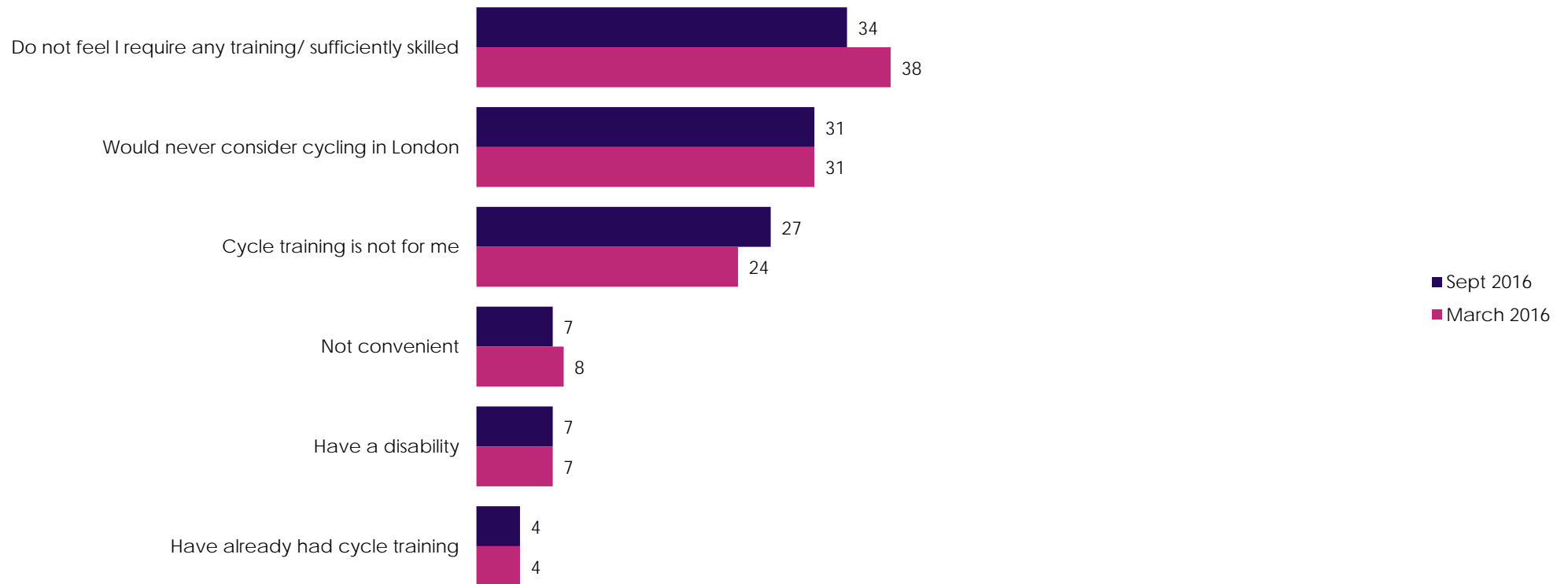
□ Significantly higher / lower vs. subgroup  
↓ ↑ Significantly up or down vs. March 2016



Q4b. Would you consider taking cycle training in the future?

Base: all Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180)



# Resistances to taking cycle training in the future



  Significantly up or down vs. March 2016

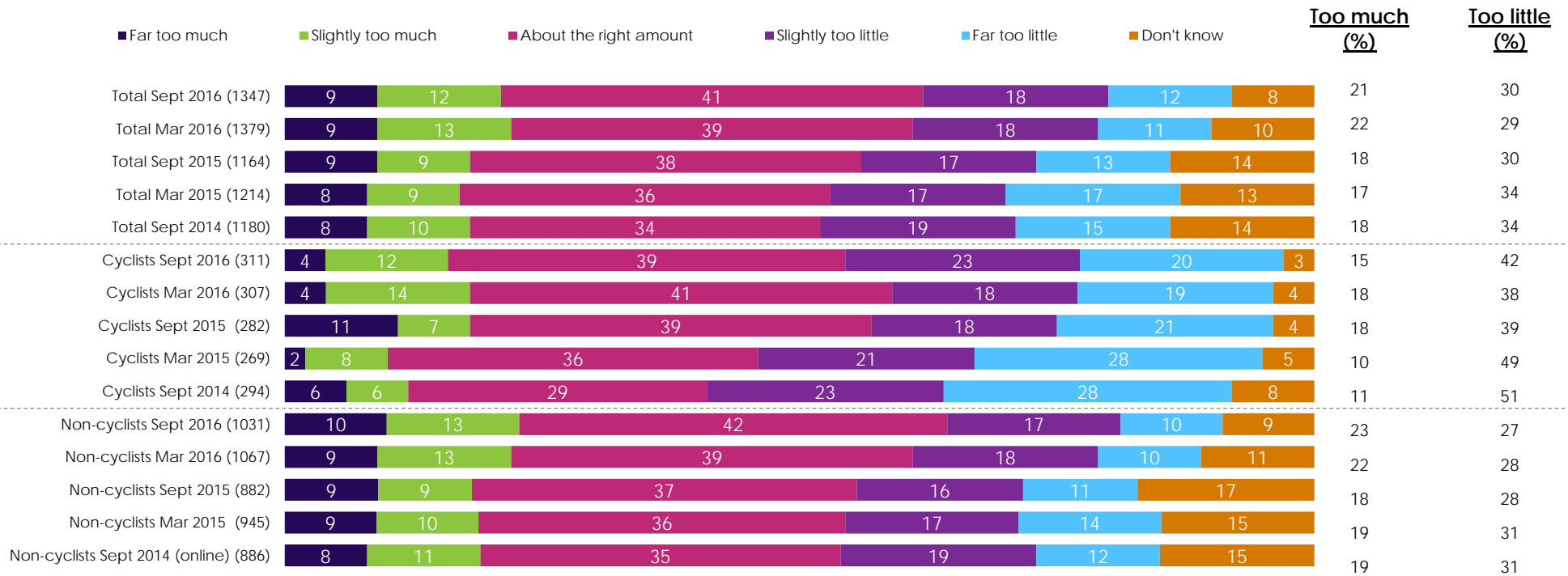
Q4c. Why wouldn't you consider taking cycle training in the future? Base: all not considering taking cycle training in the future Sept 2016 (781), Mar 2016 (787)



The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized arrow or a jagged edge pointing towards the center. The text "Investment in cycling" is written in white, sans-serif font, centered horizontally within the green area.

# Investment in cycling



# Perceptions of investment levels in cycling





 Significantly up or down vs. March 2016

Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount?  
 Base: all (base sizes in brackets above)

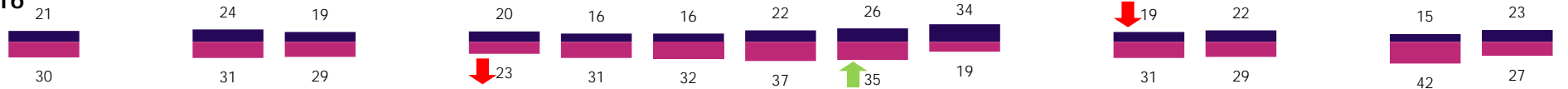


# Perception of investment levels in cycling

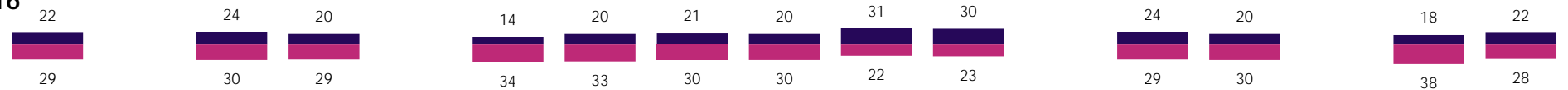


■ Too much ■ Too little

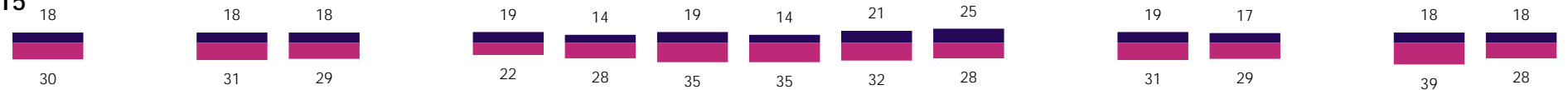
Sept 2016



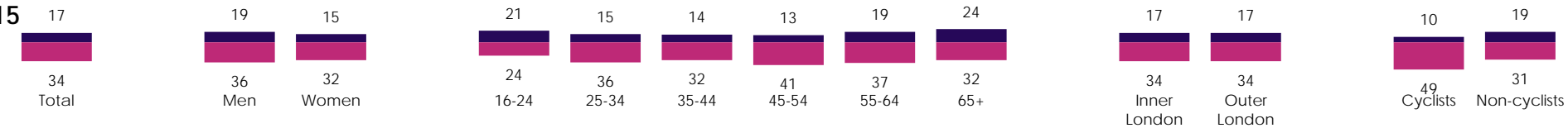
Mar 2016



Sept 2015



Mar 2015



↓ ↑ Significantly up or down vs. March 2016

Q5: Thinking about all the things that are being done to help people cycle around London - including training, facilities and infrastructure investment - do you think that there has been too much investment in cycling, too little, or about the right amount? Base: All Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214)

# Awareness of TfL's responsibility to improve cycling conditions

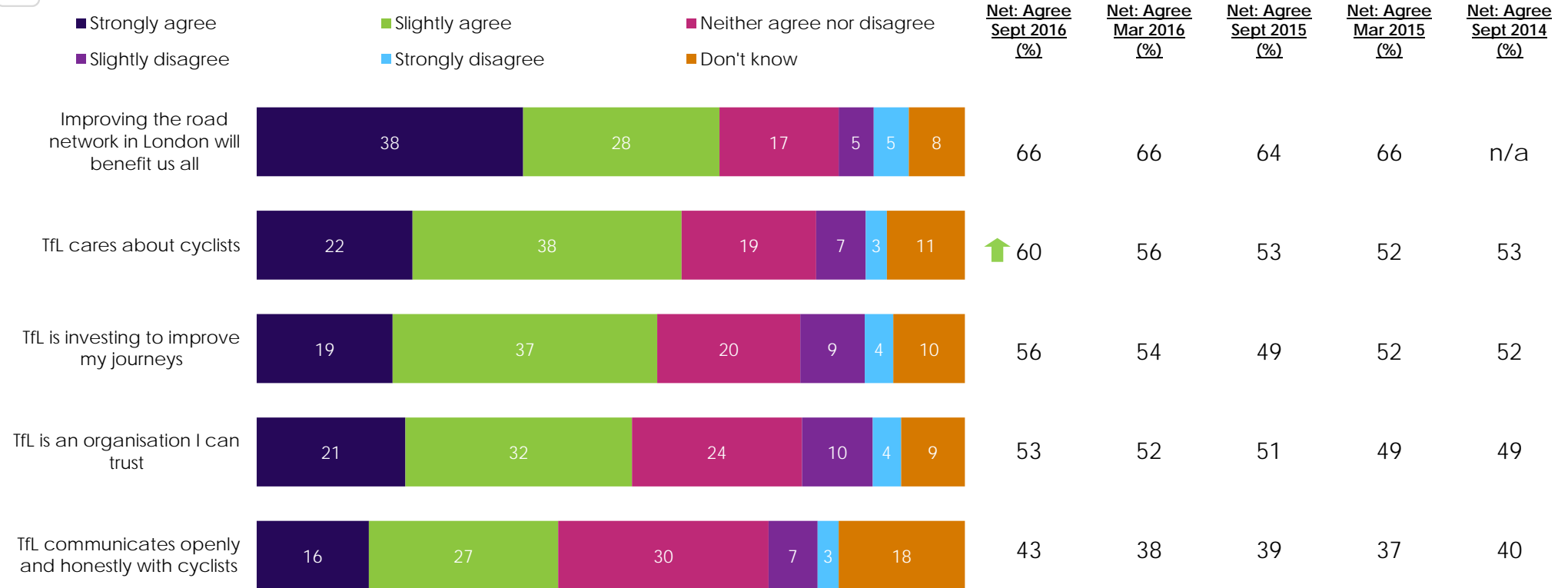
%



Significantly up or down vs. March 2016

Q6B: Transport for London is responsible for improving conditions for cycling, including management of the Cycle Hire scheme and Cycle Superhighways, providing guides and maps, providing cycle training and safety advice, providing cycle parking, and improving road conditions and safety for cyclists. Were you aware of this before today? Base: All respondents All Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214)

# Reputation statements

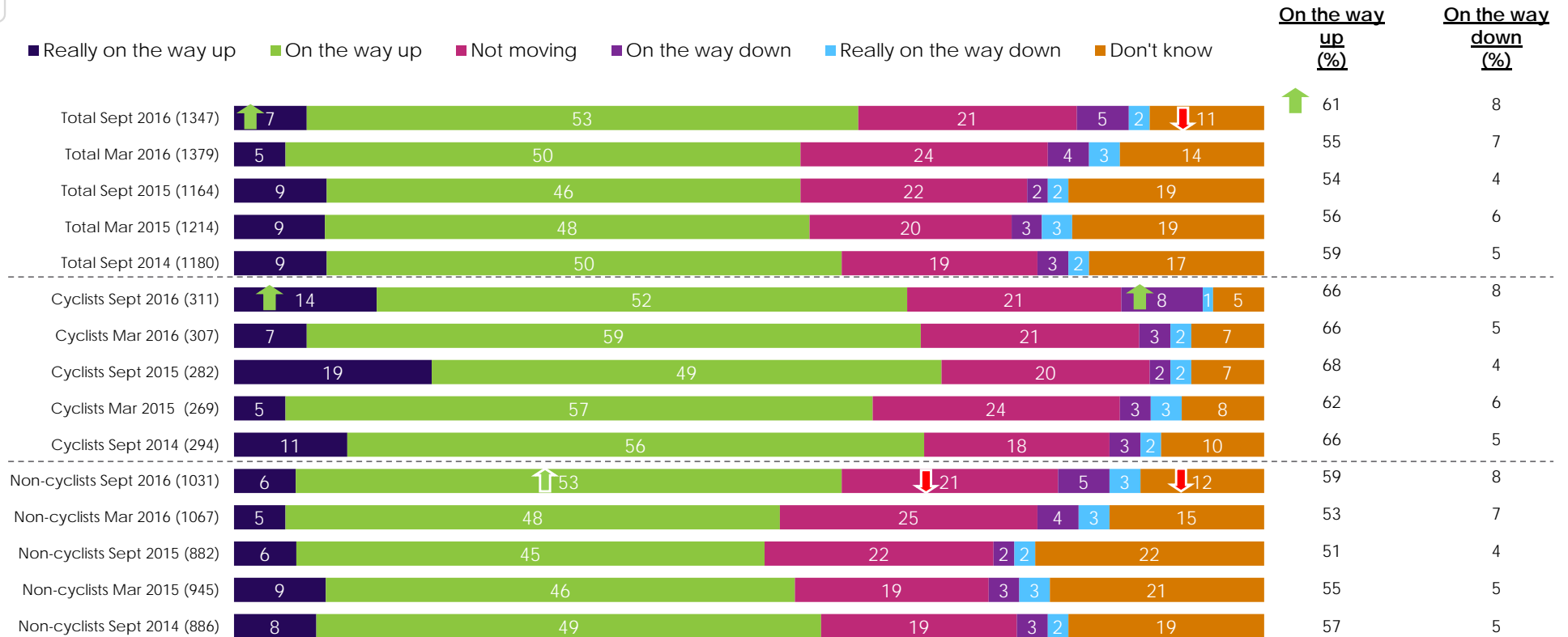


Significantly up or down vs. March 2016

Q8. Still thinking about Transport for London (TfL) in relation to cycling, to what extent do you agree or disagree with the following statements?  
 Base: All Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180)



# Momentum



Significantly up or down vs. March 2016

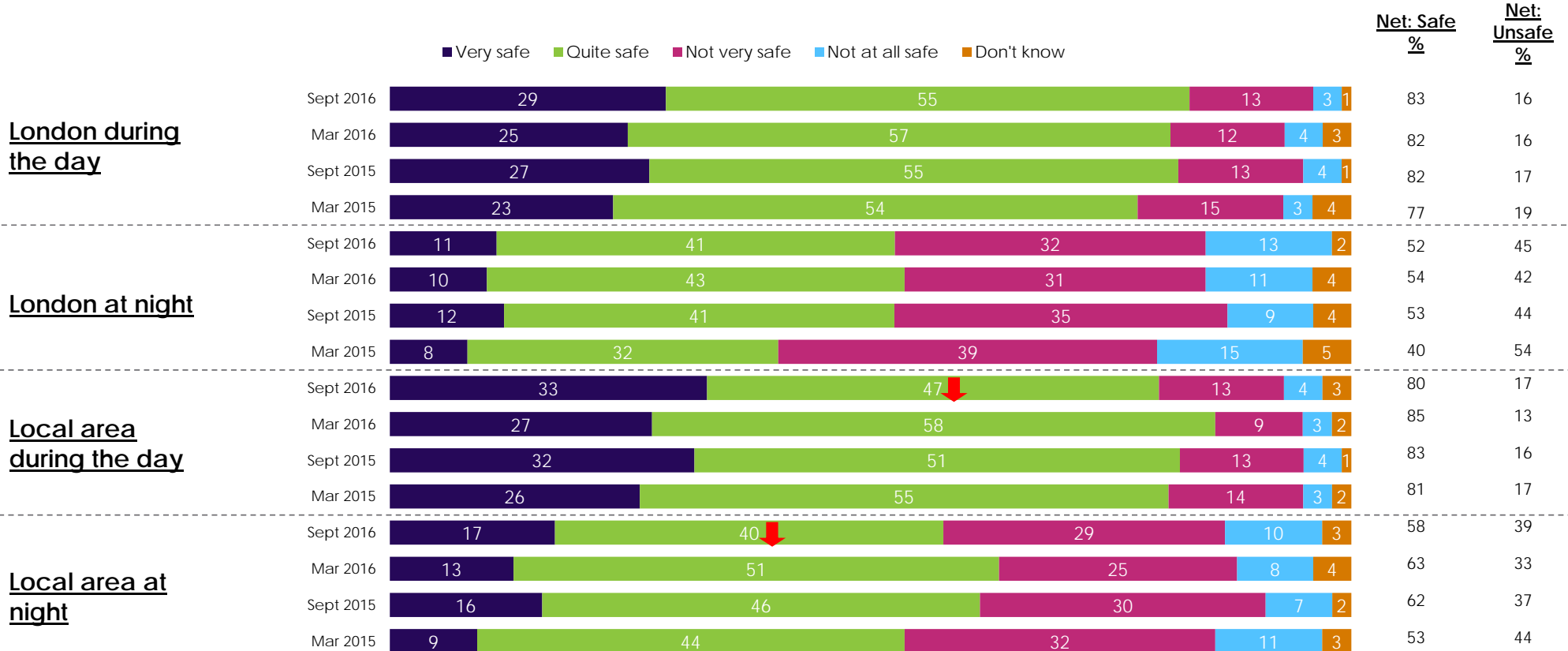
Q7. Thinking about Transport for London (TfL) in relation to cycling, which of these statements best describes TfL?  
 Base: all (base sizes in brackets above)





Cycle crime

# Safety from crime and anti-social behaviour of cycling in London and local area

%



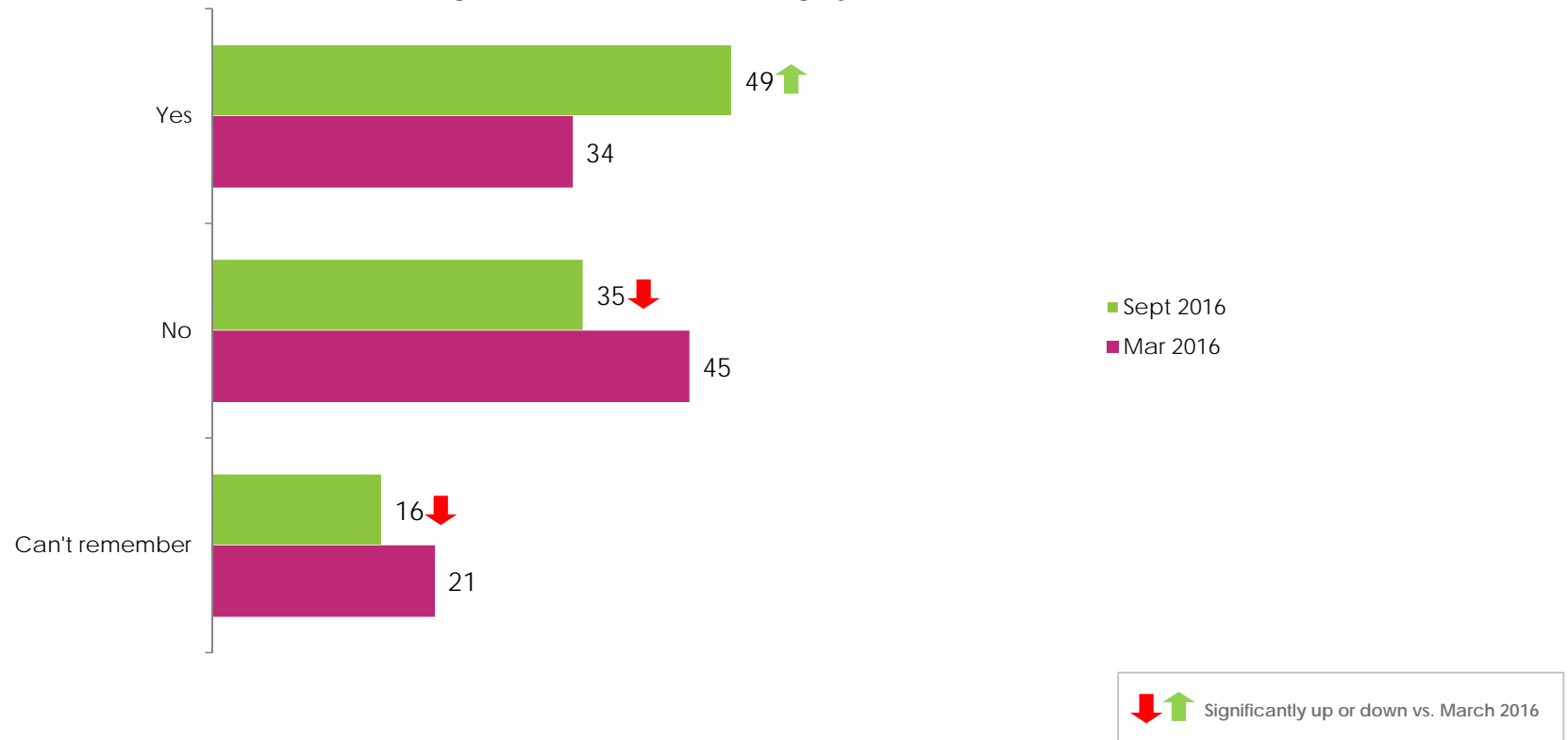

 Significantly up or down vs. March 2016

K1 - K4. Thinking about cycling in {London/local area} {during the day/at night}, how safe from crime or antisocial behaviour do you feel?  
 Base: All cyclists - Sept 2016 (295), Mar 2016 (306), Sept 2015 (267), Mar 2015 (284)

# News and social media coverage of collisions involving cyclists



**Seen news or social media coverage about collisions involving cyclists in last month**



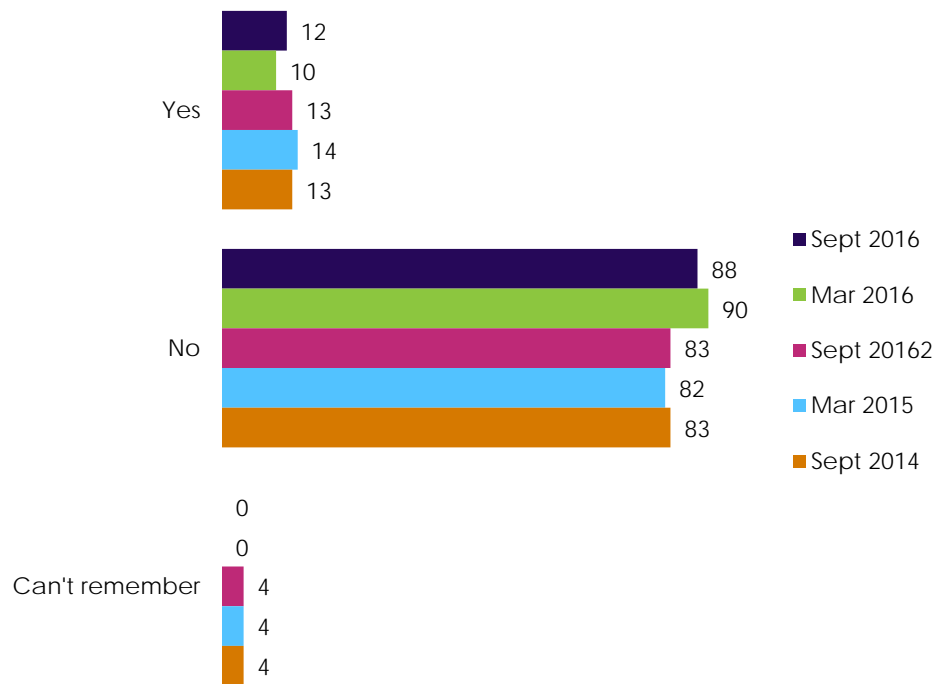
L4: Have you seen any news or social media coverage about collisions involving cyclists in the last month?  
Base: All respondents: Sept 2016 (1347), Mar 2016 (1379)



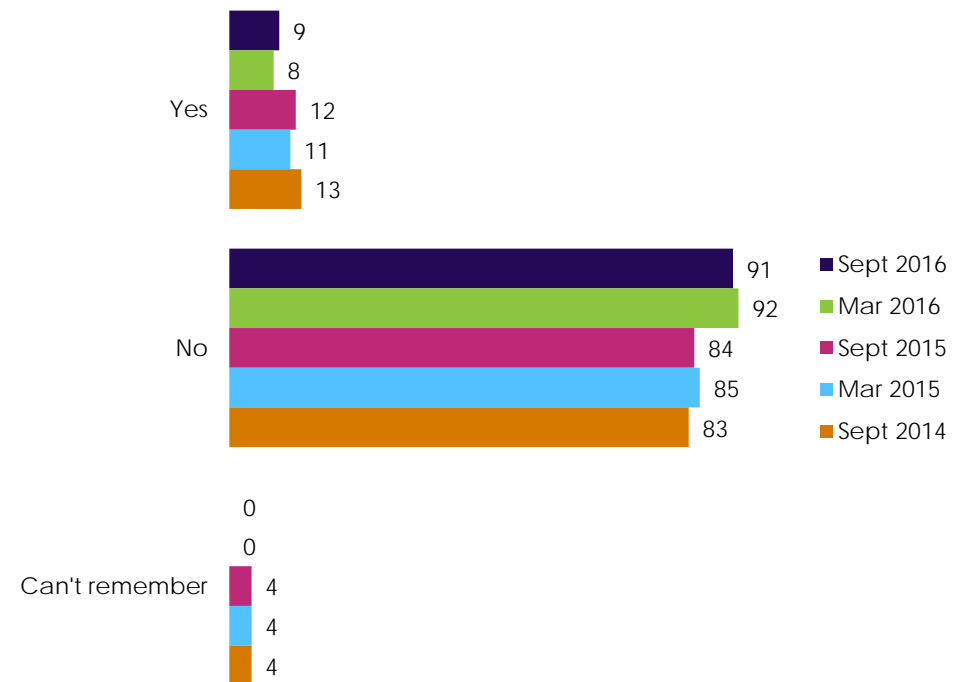
# Reported incidence of cycle theft



**Whether had whole bike stolen - %**



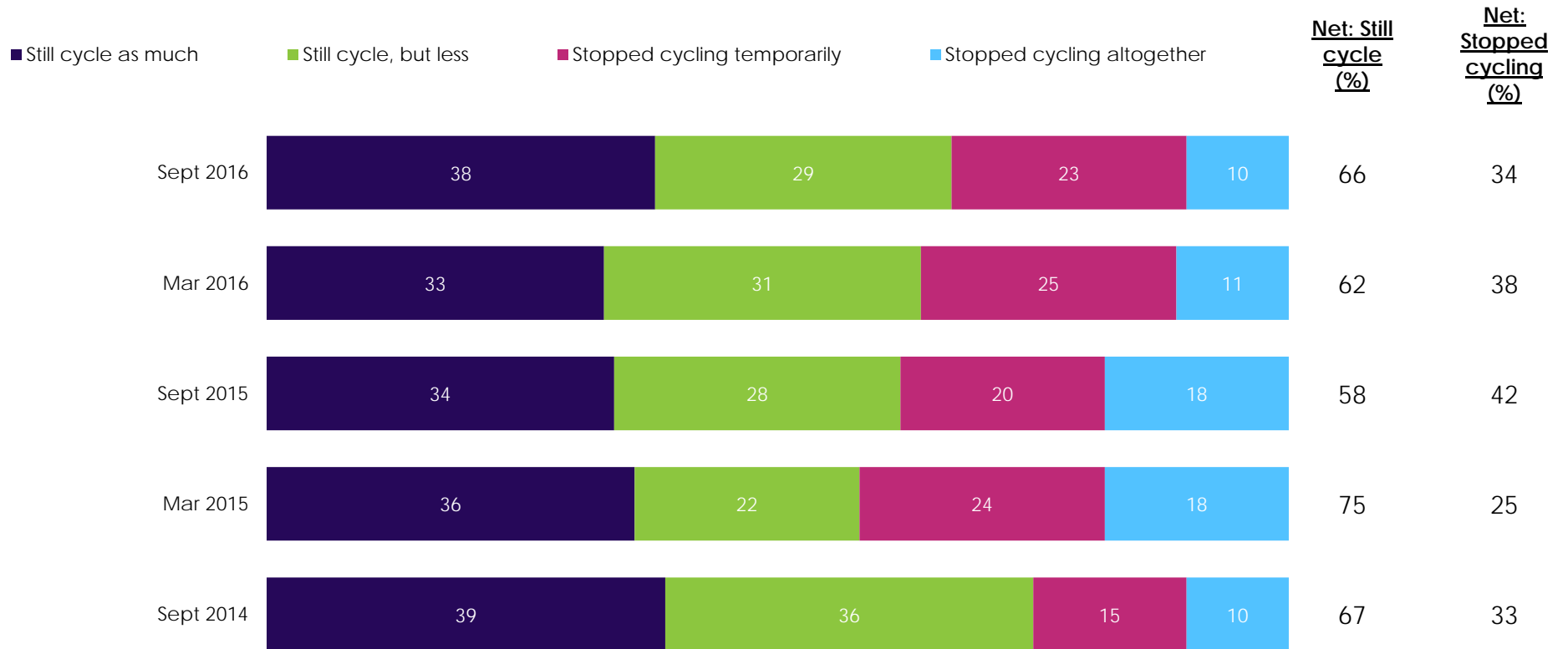
**Whether had part of a bike stolen - %**



Significantly up or down vs. March 2016

L5: In the last two years, have you ever had a bike - or part of a bike - stolen?  
 Base: all - Sept 2016 (1347), Mar 2016 (1379), Sept 2015 (1164), Mar 2015 (1214), Sept 2014 (1180)

# Impact of cycle theft on level of cycling



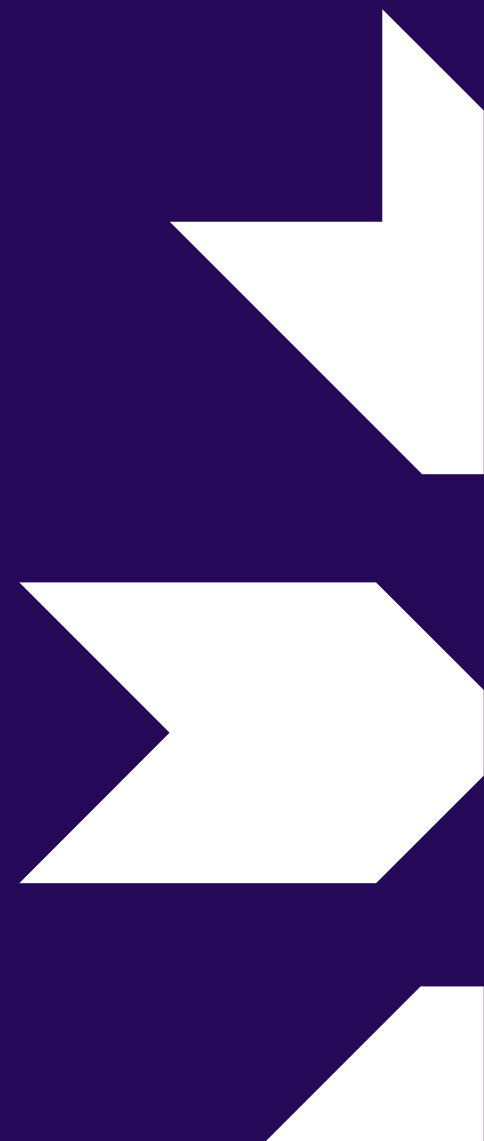
Significantly up or down vs. March 2016

L12: What impact did being a victim of theft have on your level of cycling?

Base: Those who have had a bike stolen – Sept 2016 (211), Mar 2016 (178), Sept 2015 (191), Mar 2015 (215), Sept 2014 (207)



# Cycling confidence



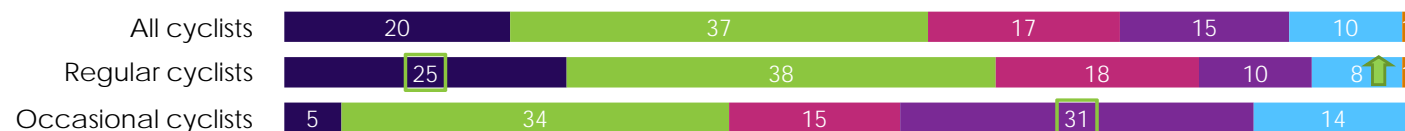
# Cycling confidence in London generally



■ Very confident 
 ■ Fairly confident 
 ■ Neither confident nor unconfident 
 ■ Not very confident 
 ■ Not at all confident 
 ■ Don't know

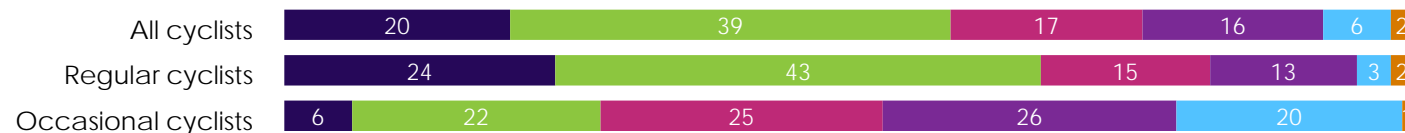
**Confident %**      **Not Confident %**

## Sept 2016



Cyclist Type	Confident %	Not Confident %
All cyclists	57	24
Regular cyclists	63	18
Occasional cyclists	39	46

## Mar 2016



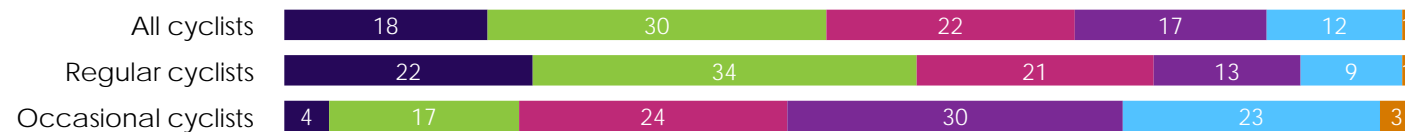
Cyclist Type	Confident %	Not Confident %
All cyclists	59	22
Regular cyclists	67	16
Occasional cyclists	28	46

## Sept 2015



Cyclist Type	Confident %	Not Confident %
All cyclists	62	25
Regular cyclists	71	18
Occasional cyclists	36	44

## Mar 2015



Cyclist Type	Confident %	Not Confident %
All cyclists	47	30
Regular cyclists	56	22
Occasional cyclists	21	52

□ □ Significantly higher / lower vs. subgroup

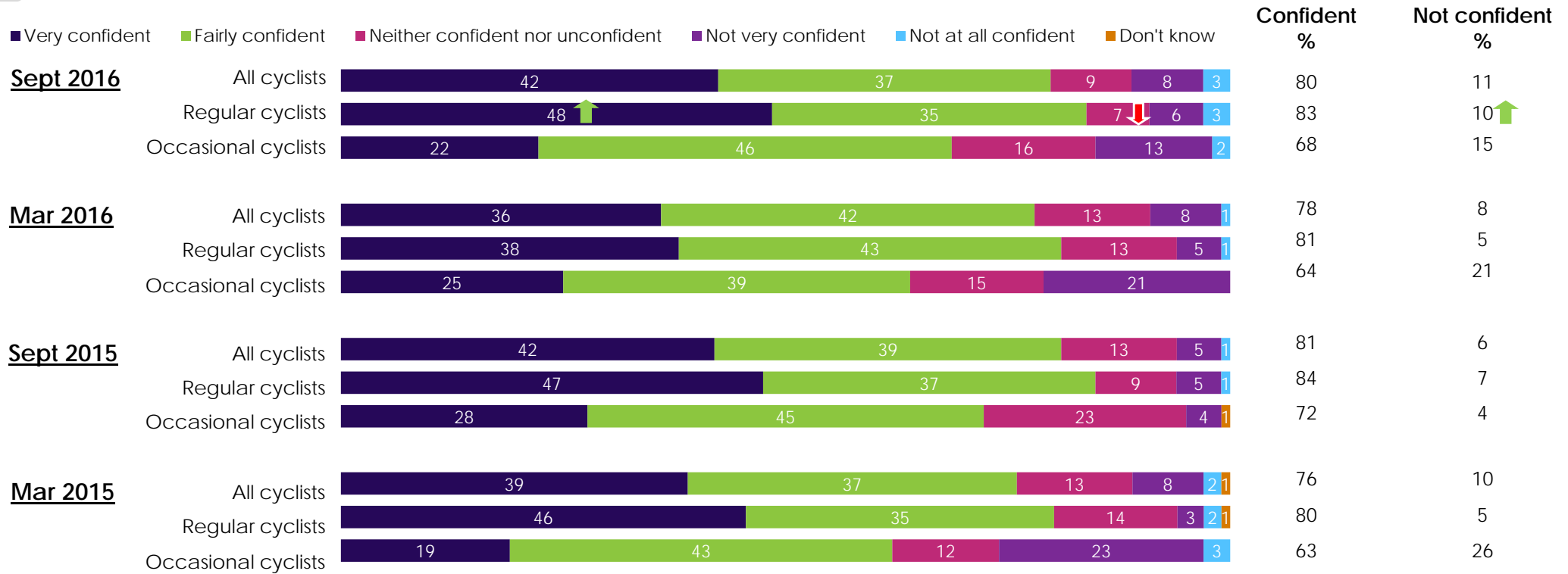
↓ ↑ Significantly up or down vs. March 2016

J1a: Generally, how confident do you feel cycling in London?

Base: Those who have cycled around London within the last 12 months Sept 2016 (295), regular cyclists (228), occasional cyclists (67),

Mar 2016 (306), regular cyclists (245), occasional cyclists (61), Sept 2015 (267), regular cyclists (199), occasional cyclists (68), Mar 2015 (284), regular cyclists (209), occasional cyclists (75)

# Cycling confidence in local area



Significantly up or down vs. March 2016

J1b: Generally, how confident do you feel cycling in your local area?

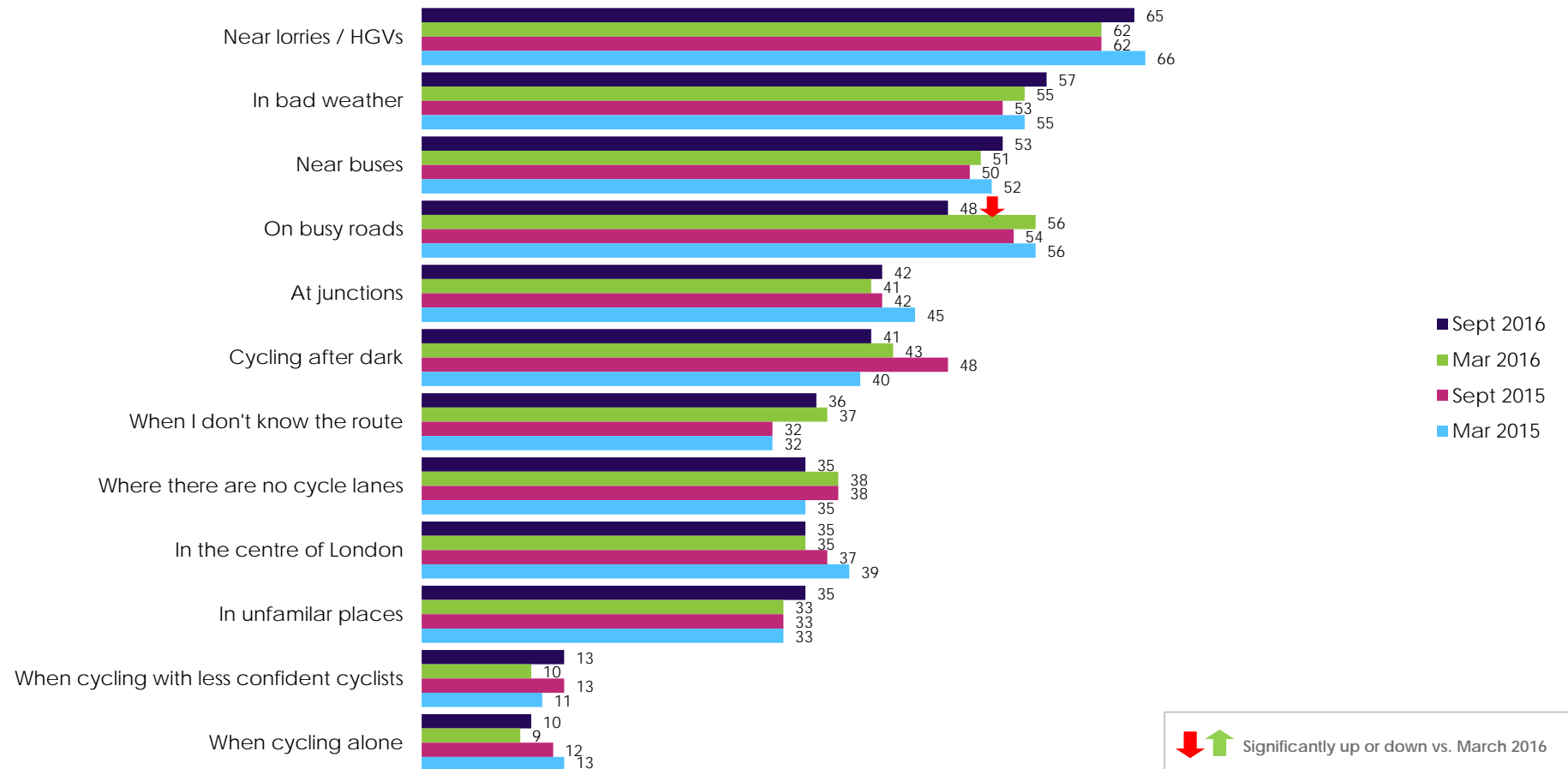
Base: Those who have cycled around London within the last 12 months Sept 2016 (295), regular cyclists (228), occasional cyclists (67),

Mar 2016 (306), regular cyclists (245), occasional cyclists (61), Sept 2015 (267), regular cyclists (199), occasional cyclists (68), Mar 2015 (284), regular cyclists (209),

occasional cyclists (75)



# Situations in which cyclists feel less confident

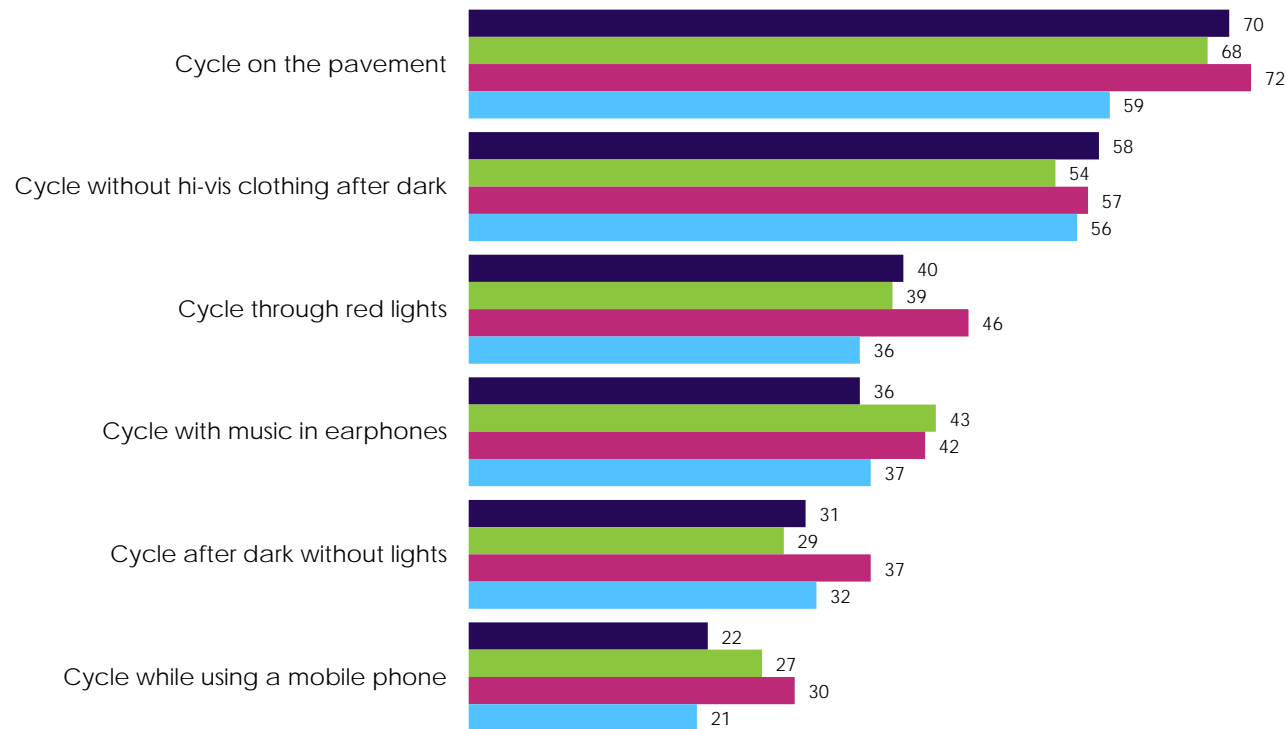


J2: Are there any situations where you feel less confident when cycling?  
 Base: All cyclists – Sept 2016 (295), Mar 2016 (306), Sept 2015 (267), Mar 2015 (284)

# Prevalence of 'cycling behaviours'



% always / sometimes



■ Sept 2016  
■ Mar 2016  
■ Sept 2015  
■ Mar 2015

↓ ↑ Significantly up or down vs. March 2016

J3: While cycling in London, how often, if ever, do you do any of the following?  
 Base: all cyclists – Sept 2016 (295), Mar 2016 (306), Sept 2015 (267), Mar 2015 (284)



The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized arrow or a jagged edge pointing towards the center. The text 'TfL Cycle Journey Planner' is centered horizontally and vertically within the green area.

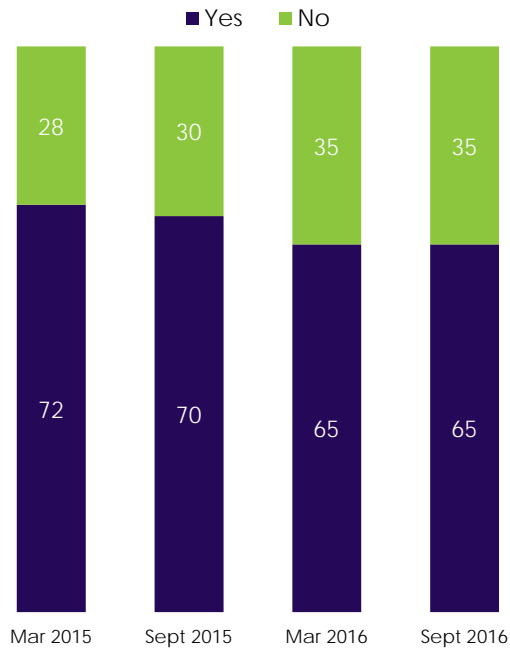
# TfL Cycle Journey Planner



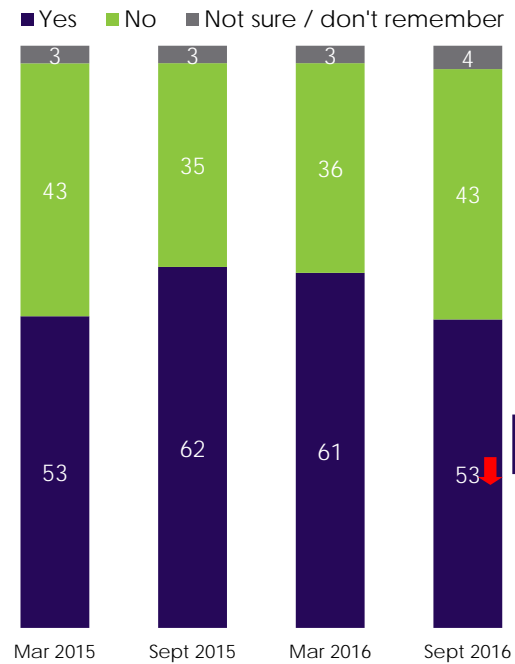
# TfL Cycle Journey Planner



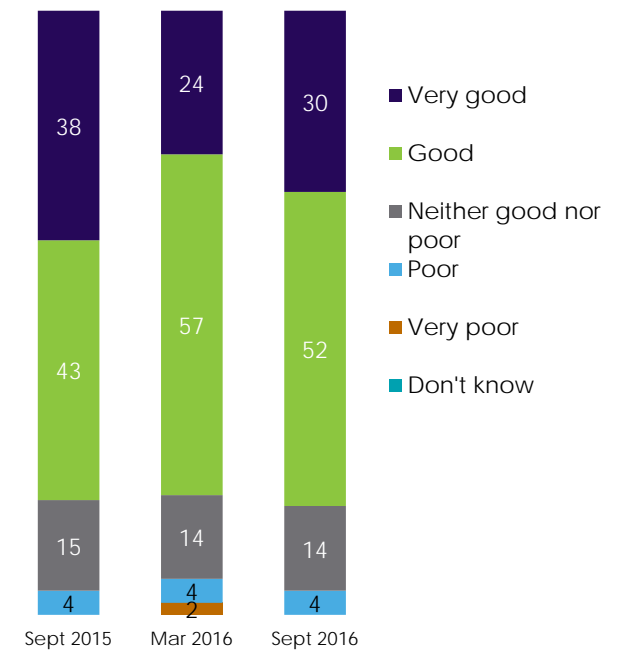
**Awareness of TfL Cycle Journey Planner (%)**



**Ever used TfL Cycle Journey Planner (%)**



**Perceptions of TfL Cycle Journey Planner (%)**



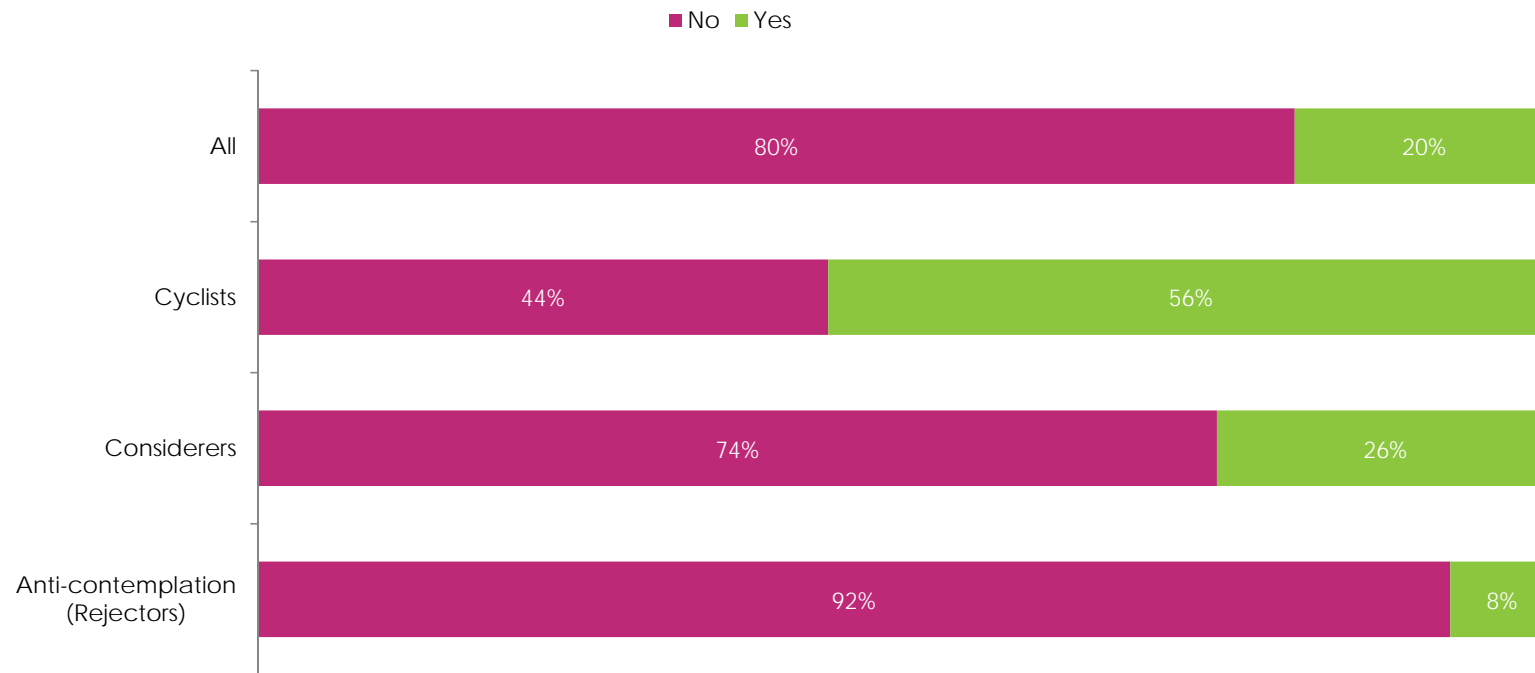
Significantly up or down vs. March 2016

JP1: Are you aware that the Journey Planner on Transport for London's website can also plan cycle routes? Base: All cyclists Sept 2016 (507), Mar 2016 (511), Sept 2015 (505), Mar 2015 (506)  
 JP2: Have you ever used the TfL Journey Planner to plan a cycle route? Base: All cyclists aware that the TfL Journey Planner can also be used to plan cycle routes: Sept 2016 (323), Mar 2016 (333), Sept 2015 (344), Mar 2015 (354)  
 JP3: How would you rate the TfL Journey Planner for planning cycle routes? Base: All cyclists who have used Journey Planner Sept 2016 (178), Mar 2016 (193), Sept 2015 (204), Mar 2015 (190)

The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized letter 'A' or a similar abstract form, composed of several triangular and quadrilateral sections. The text 'Cycling section of TfL website' is centered horizontally and positioned in the middle of the green area.

Cycling section of TfL website

# Use of online cycling information



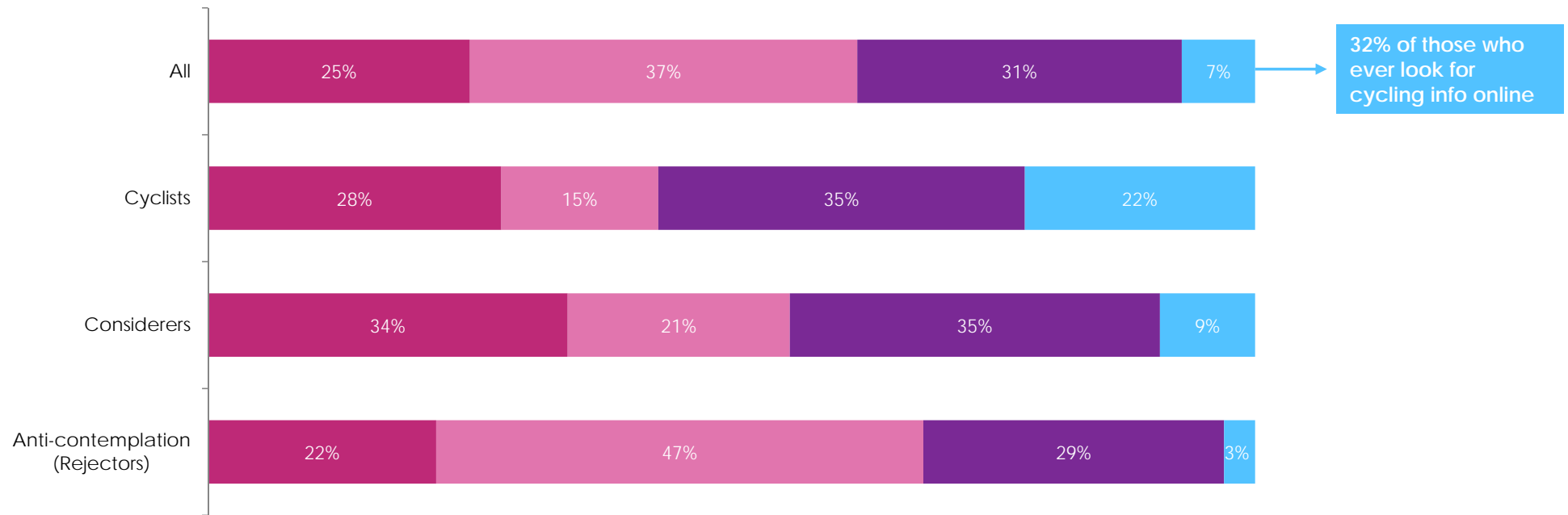
CW1. Do you ever look online for information about cycling in London and/or how to plan your cycling routes?

Base: Sept 2016 All (1347), cyclists (311), Considerers (331), Anti-contemplation (860)

# Awareness of cycling section on TfL website



- No, not aware but would be interested in using it
- No, not aware and would not be interested in using it
- Yes, aware but have not used it
- Yes, aware and have used it

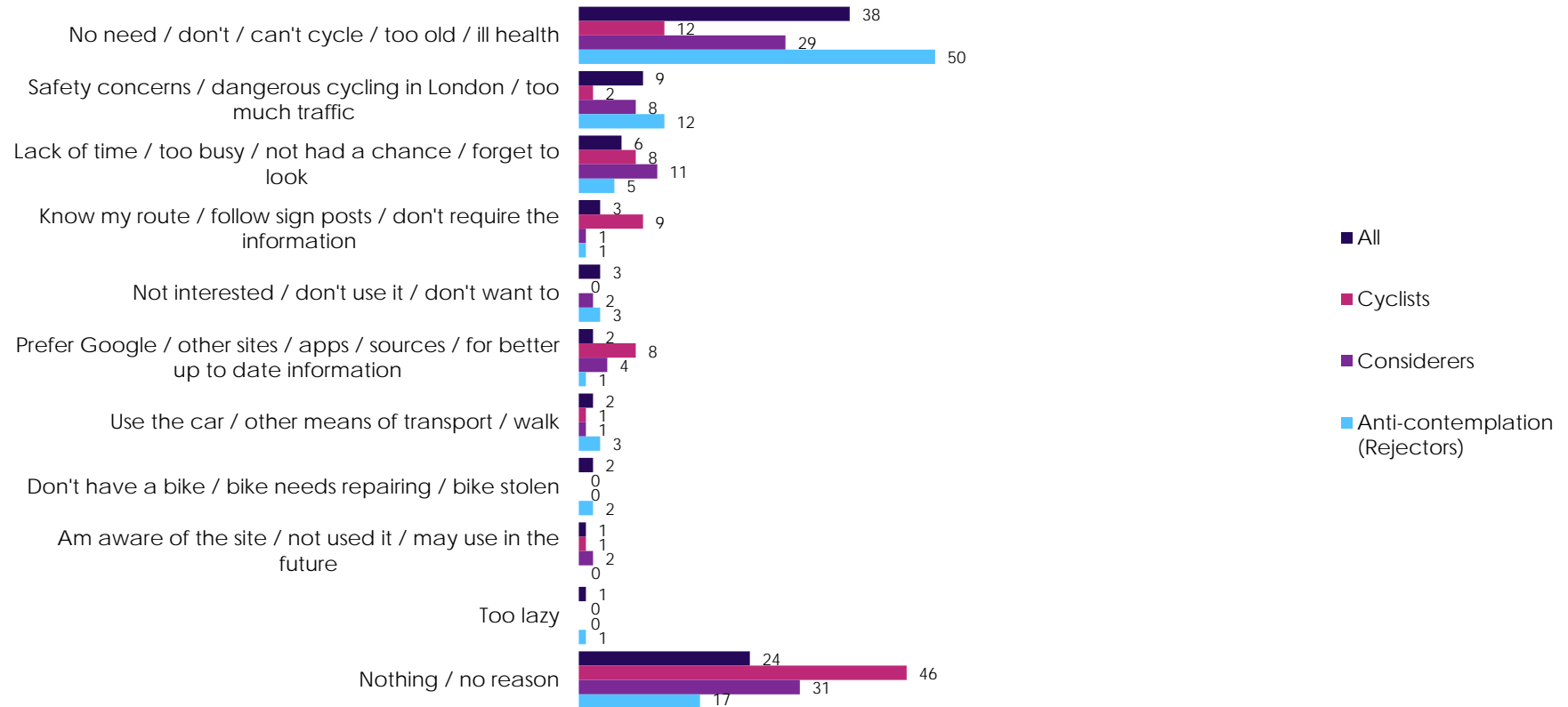


CW2. Are you aware that the TfL website has a dedicated section to help people cycle in London?

Base: Sept 2016 All (1347), cyclists (311), Considerers (331), Anti-contemplation (860)



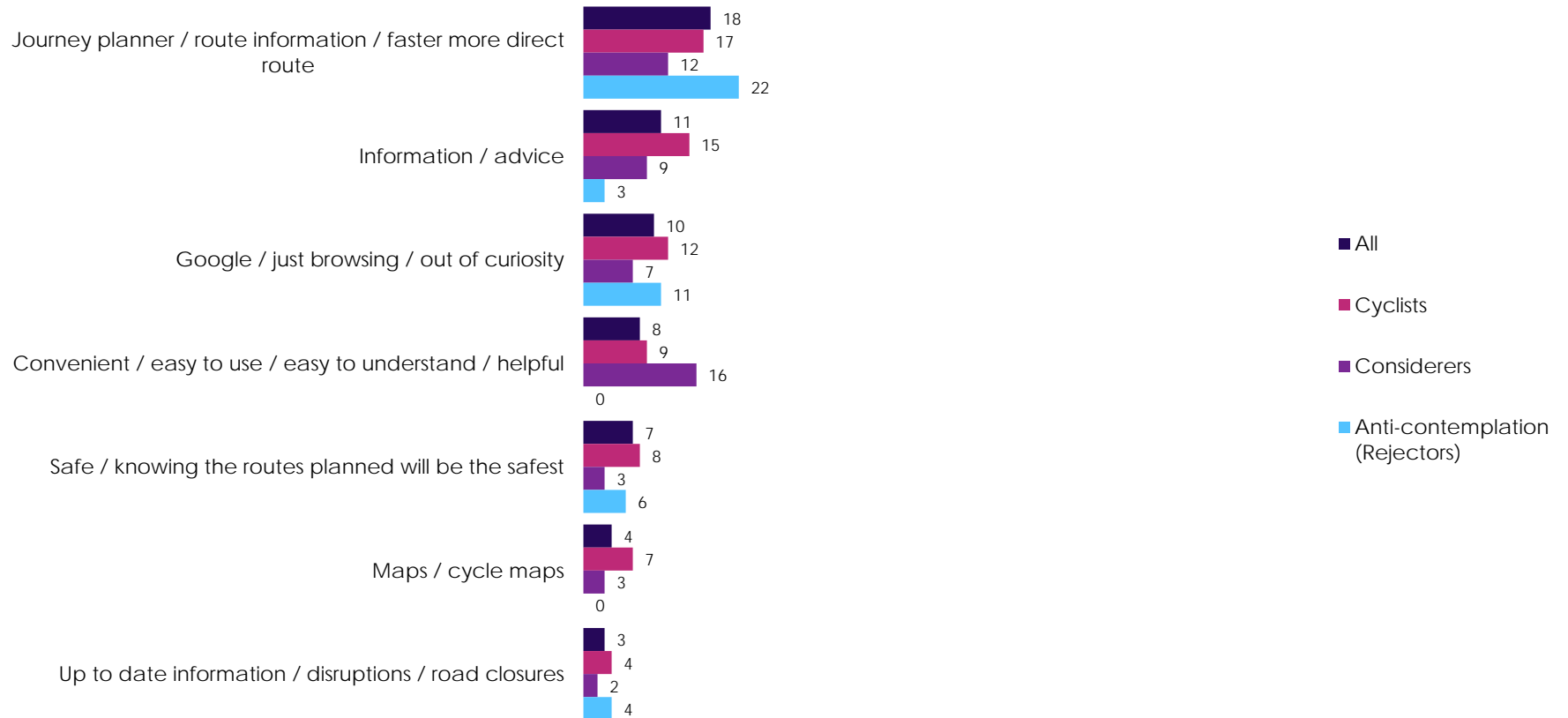
# Reasons for not using the cycling section of the TfL website



CW3. Is there any particular reason why you haven't used it?

Base: Sept 2016 All (411), cyclists (107), Considerers (118), Anti-contemplation (242)

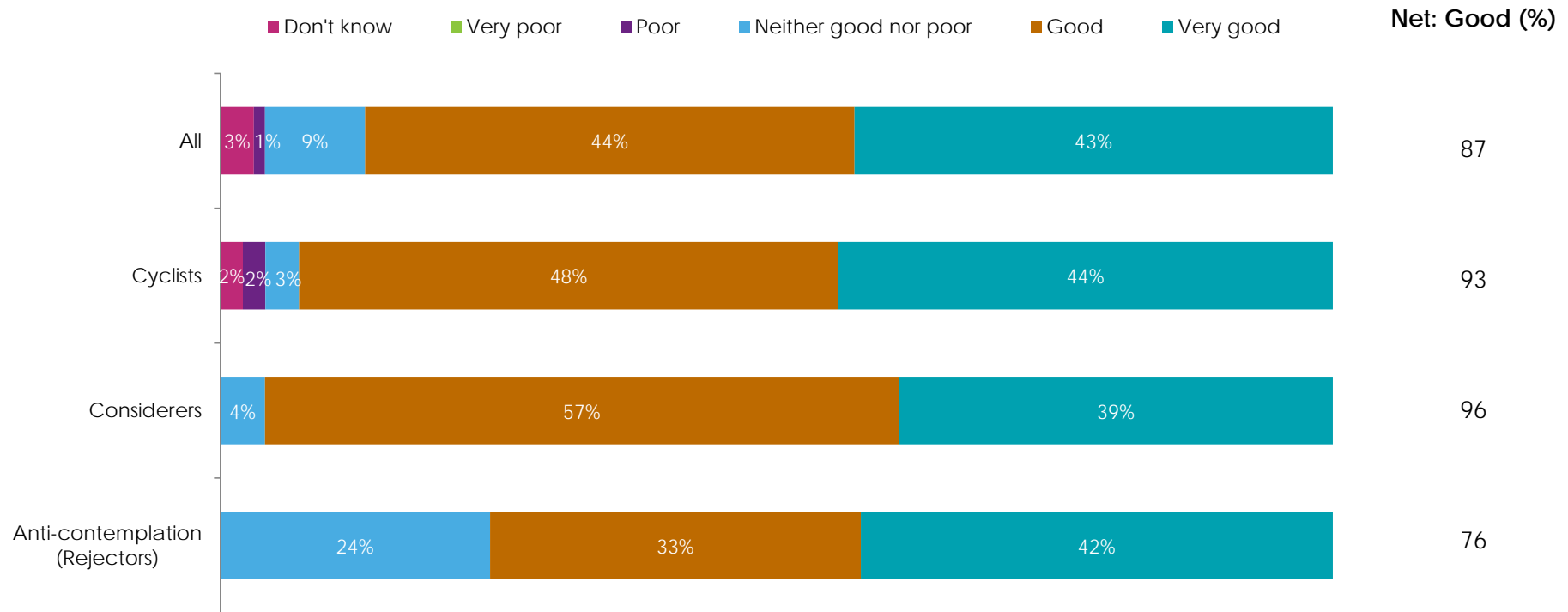
# What prompted use of the cycling section of the TfL website



CW4. What was it that prompted you to use the cycling section of the TfL website?

Base: All who have used cycling section of TfL website All (102), Cyclists (67), Considerers (31), Anti-contemplation (23)

# Rating of cycling section on TfL website

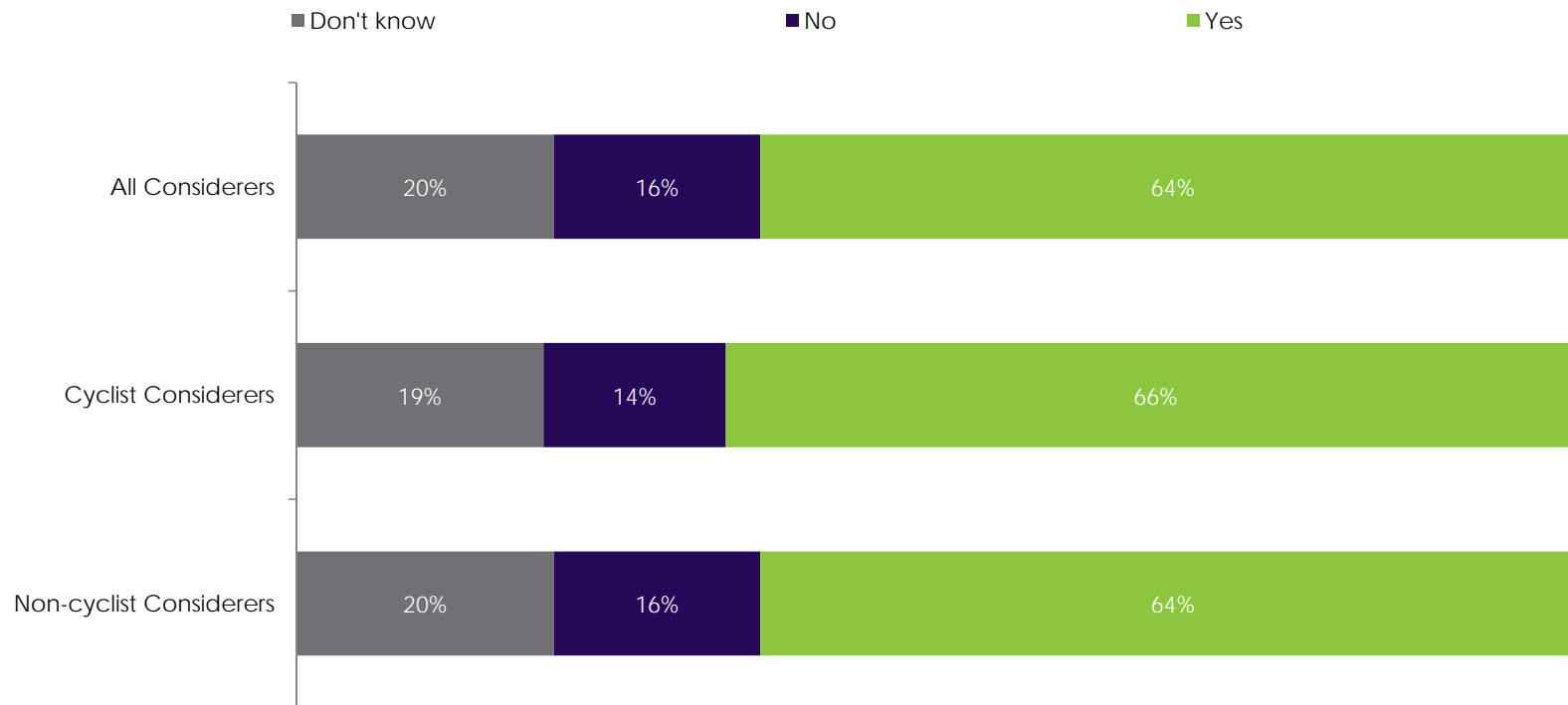


CW5. How would you rate the cycling section of the TfL website?

Base: All who have used cycling section of TfL website Sept 2016 All (102), cyclists (67), Considerers (31), Anti-contemplation (23)



# Potential impact of online tools on cycling propensity

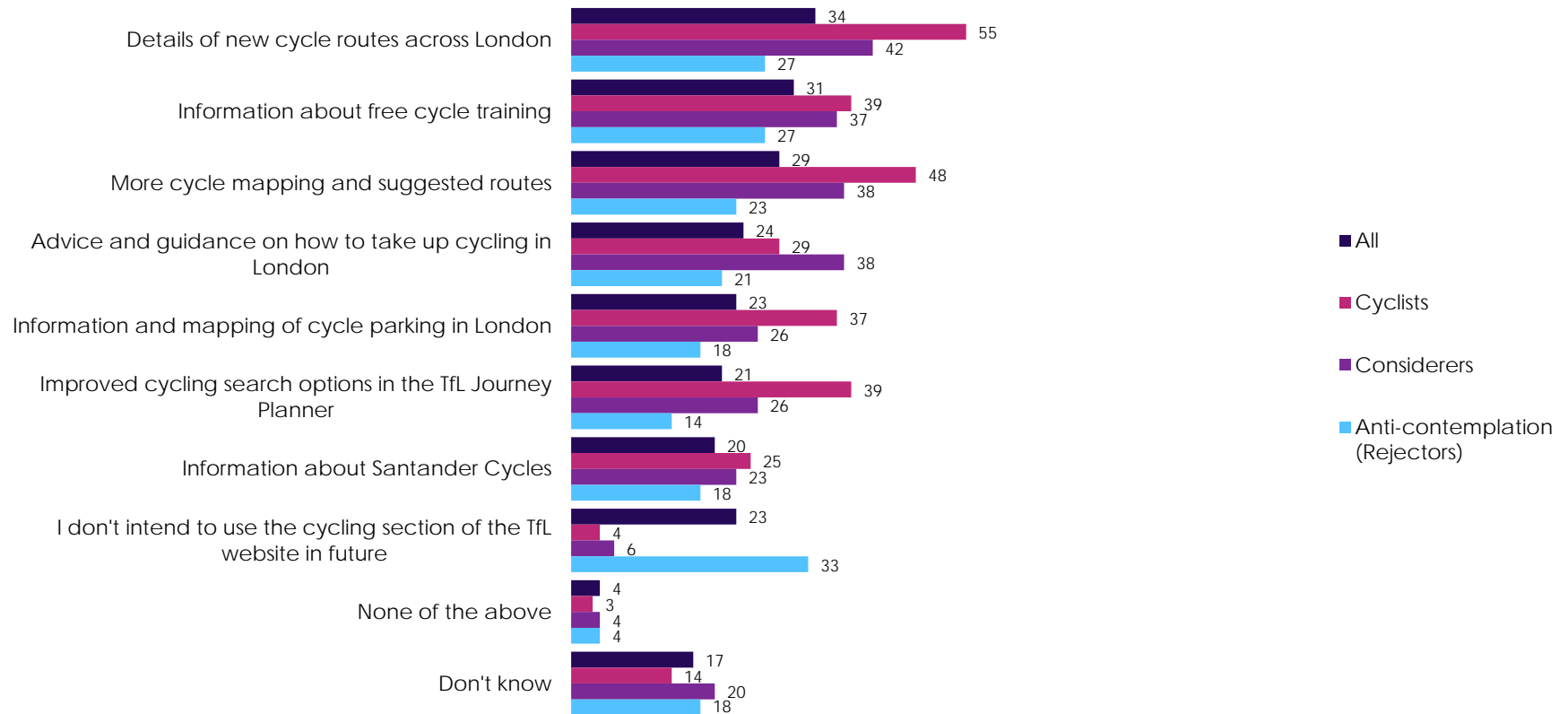


CW6. Would online information about things like how to take up cycling, safer cycle routes and new journey planning tools help you to consider 'cycling more'/'taking up cycling' in the future?

Base: All who have used cycling section of TfL website Sept 2016 All Considerers (331), Cyclist Considerers (69), Non-cyclist Considerers (262)



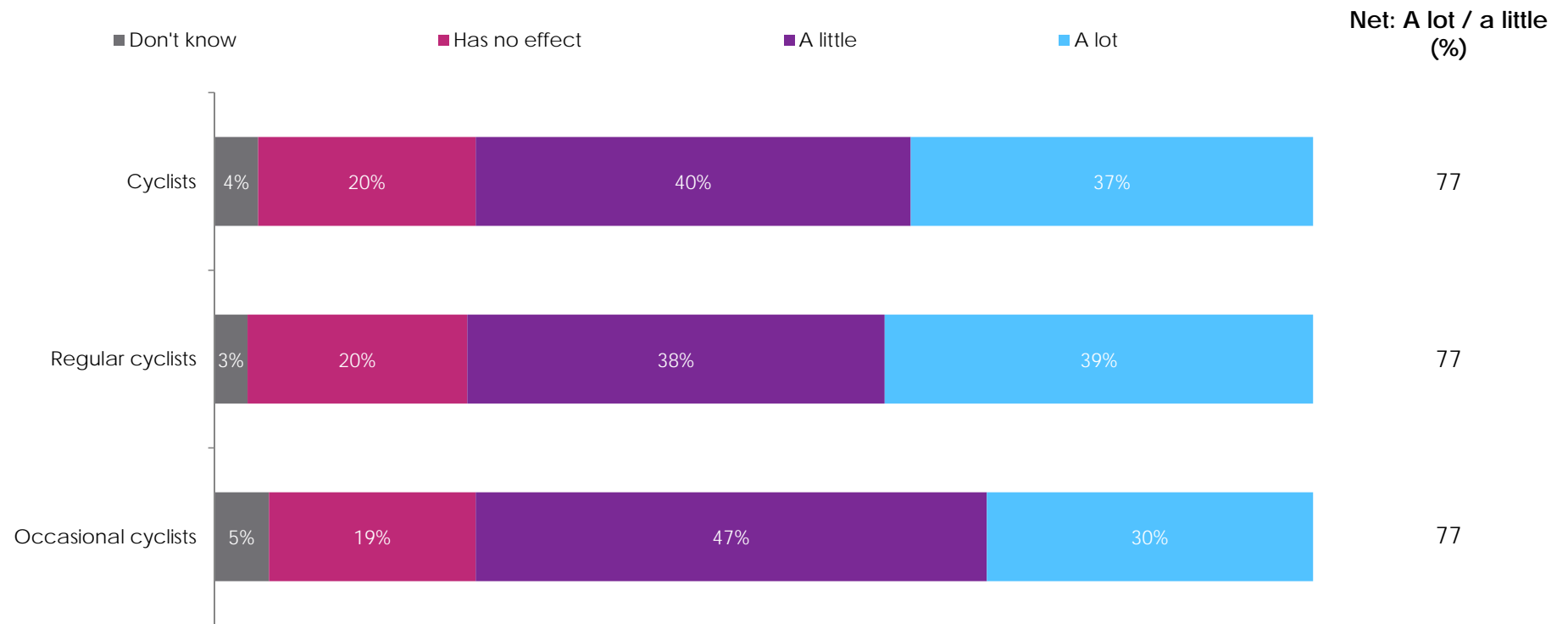
# What info people would like to see in the cycling section of the TfL website



CW7. What, if anything, do you think could be done to improve the cycling section of the TfL website? If you haven't used it before, what information would you like to see if you were to use it in the future?

Base: Sept 2016 All (1347), cyclists (311), Considerers (331), Anti-contemplation (860)

# Extent to which online tools help cycling in London



CW8. To what extent would you say that online cycling information, cycle mapping and journey planning tools help you to cycle in London?

Base: Sept 2016 All cyclists (311), Regular cyclists (236), Occasional cyclists (75)



The image features a solid green background. On the left side, there is a white geometric shape that resembles a stylized letter 'A' or a similar abstract form, composed of several triangular and quadrilateral sections. The text 'Methodology and sample profile' is centered horizontally and positioned in the middle of the green area.

# Methodology and sample profile

# Methodology

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The research comprised 2,193 online interviews with adult Londoners, plus 122 further interviews with cyclists to boost the total sample of cyclists to 507

Data collection took place from 24 October to 23 November 2016

The survey took place online using one of Future Thinking's preferred online panel providers. In order to achieve as a representative sample as possible, non-interlocking quotas were set on gender, age, ethnicity, working status and inner / outer London boroughs

The final data set was weighted back to be representative of Londoners in terms of age, gender, inner/outer London, ethnicity and working status according to 2011 census data



## Sample profile

Variable	% of total (2,315)	% of cyclists (507)
<b>Gender</b>		
Men	49	60
Women	51	40
<b>Age</b>		
16-24	15	13
25-34	25	34
35-44	20	26
45-54	16	14
55-64	11	8
65+	14	4
<b>Ethnicity</b>		
White	63	63
BAME	37	37

Variable	% of total (2,315)	% of cyclists (507)
<b>Working status</b>		
Working	62	78
Not-working	38	22
<b>Social class</b>		
AB	47	59
C1	32	26
C2	9	9
DE	12	6

## Socio-economic group definitions

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Socio-economic group	Occupation of chief income earner in household
<b>AB</b>	Higher managerial, administrative or professional / Intermediate managerial, administrative or professional
<b>C1</b>	Supervisory or clerical, junior managerial, administrative or professional or students
<b>C2</b>	Skilled manual workers
<b>DE</b>	Semi and unskilled manual workers / State pensioners or widows (no other earner), casual or lowest grade workers

